Modernized ACE Portal

Trade Account Types

December 2023

U.S. Customs and Border Protection

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Topic 1: What's New?

Released – December 2023

New functionality in the Modernized ACE Portal includes the ability to perform blanket declaration tasks in importer and organizational broker account types:

1. **Importers** with an ACE portal account can complete actions to search, print, add and cancel blanket declarations.
2. **Organizational Brokers** can complete blanket declaration search, print, add, and cancel actions on behalf of importers without an ACE portal account.

The following blanket declarations are supported in the Modernized ACE Portal:

- Affidavit of Manufacture
- Importer Certifying Statement
- Non-Reimbursement Blanket Statement (Antidumping/Countervailing Duty (AD/CVD))
- North American Free Trade Agreement (NAFTA) Certificate of Origin

For detailed information and steps to complete blanket declaration actions in the Modernized ACE Portal, select this link to access the training guide: **Blanket Declarations Quick Reference Guide (QRG)**.

The **ACE Training and Reference Guides** webpage (https://www.cbp.gov/trade/ace/training-and-reference-guides) provides convenient access to all **Modernized ACE Portal** training materials.

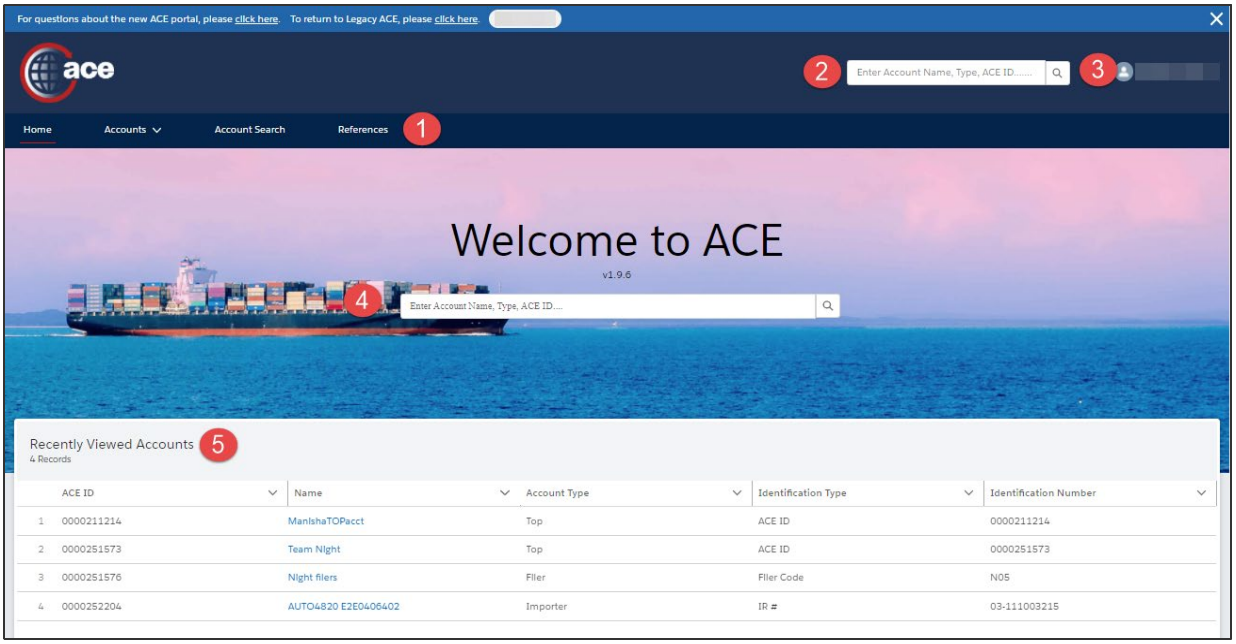
Topic 2: Navigate the Modernized ACE Portal

Introduction

After creating your Modernized ACE Portal account, the Modernized ACE Portal home page displays. The home page consists of:

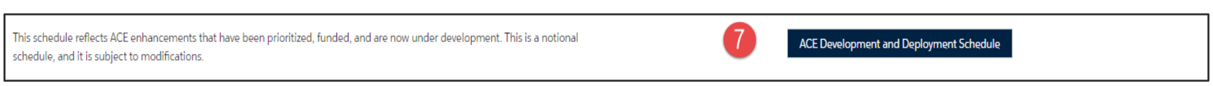
1. **Home**, **Accounts**, **Account Search**, and **References** tabs
    - **Home** – Returns you to the home page.
    - **Accounts** – Contains a list of all types of accounts.
    - **Account Search** – Displays all search results and filter capability.
    - **References** – Displays links to other ACE applications.
        - Use the **CEE Directory** link in the **References** tab to access and search Centers of Excellence and Expertise (CEE) contacts.
        - Change the display order of the tiles by selecting a tile and using your mouse to drag and drop it at the desired location.
        - Additional system links will be added on the **References** tab page as modernized portal functionality development continues.
2. **Global Search** (**Enter Account Name**, **Type**, **ACE ID**…)
    - Search for accounts and records by keyword, name, or identifier.
3. (**Your Name**) drop-down menu:
    - **Contact Support** – Contact CBP with technical issues concerning the Modernized ACE Portal.
    - **Log Out** – Log out of the Modernized ACE Portal.
4. **Global Search** (**Enter Account Name**, **Type**, **ACE ID**…)
    - Search for accounts and records by keyword, name, or identifier.
5. **Recently Viewed Accounts**
    - The last ten accounts viewed.
    - Select an account hyperlink to display the account details.

IMPORTANT: As a Trade user, you only are able to see your Top Accounts and the associated subaccounts. If you view one account ten times, it will only display once in the **Recently Viewed Accounts** list.



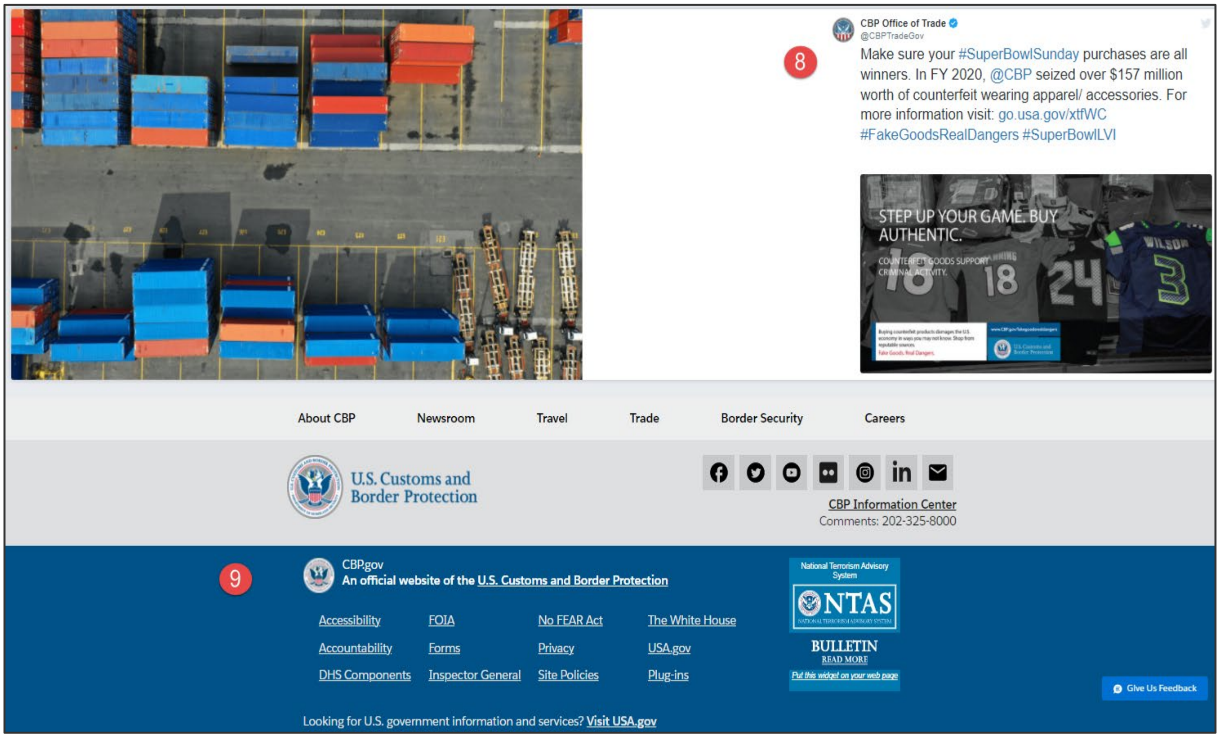
6. **CBP News**, **CSMS Feed**, and **ACE Support -** Contains general CBP news, hyperlinks to Cargo System Messaging Service (CSMS) messages, and ACE support resources.

7. **ACE Development and Deployment Schedule -** Contains information associated with the Modernized ACE Portal deployments, and upcoming ACE Portal events.



8. **CBP Twitter Feed** – Contains links to CBP news.

9. **Footer** – Contains links to additional information not associated with the Modernized ACE Portal.

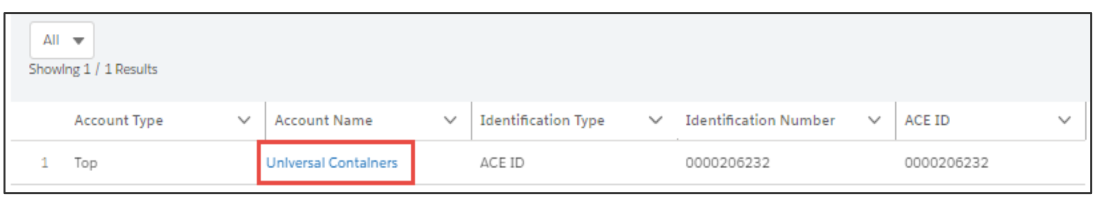


Search for an Account Using the Global Search Field

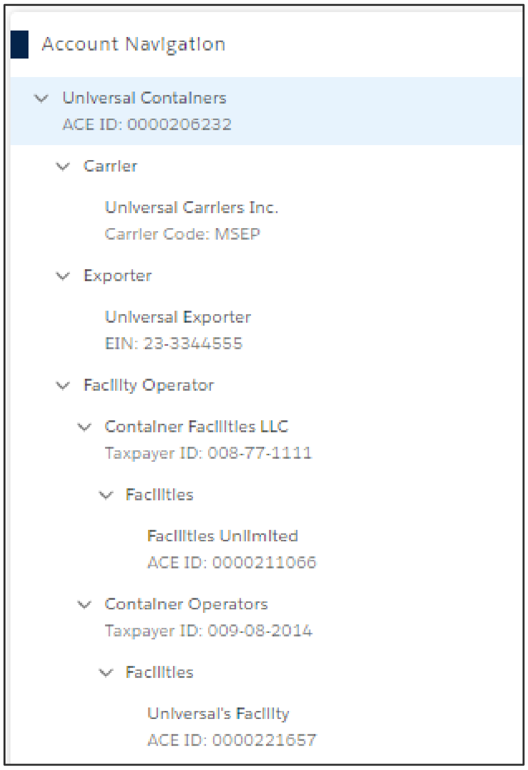
1. In the **Global Search** field:
   a. Type the *account name*.
   b. Select the **Search** icon .

TIP: You can also select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If the account is in the **Recently Viewed Accounts** list, select the account hyperlink.

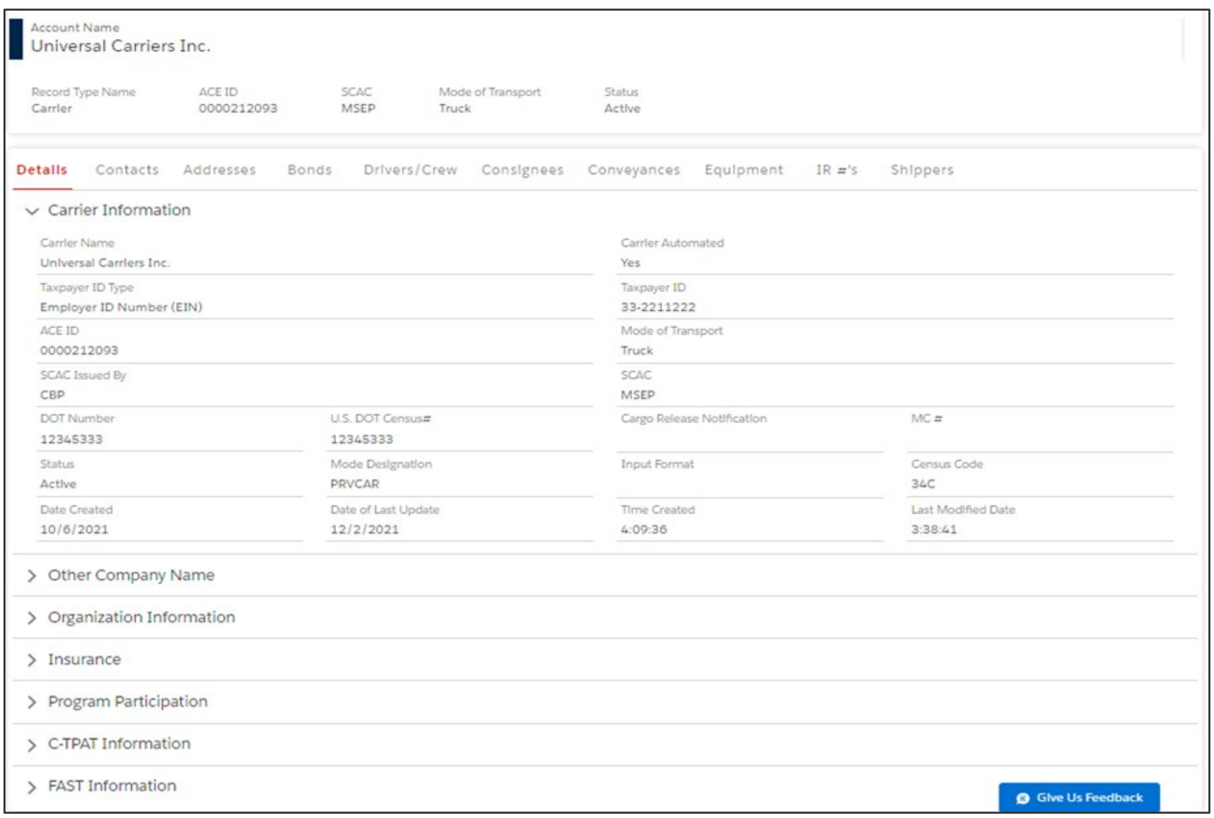
2. In the search results that display, in the **Account Name** column, select an account name hyperlink.



The account details page displays. All subaccounts associated with the Top Account display in the **Account Navigation** pane.

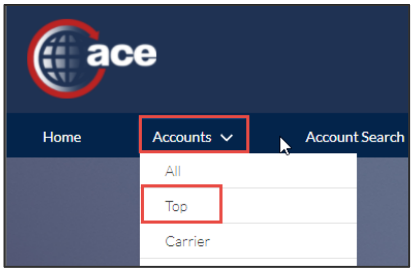


3. Select any subaccount to display the subaccount's details.



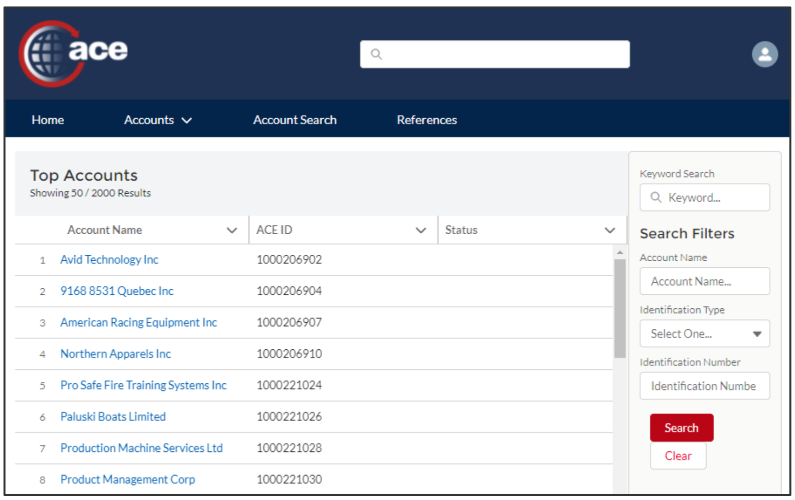
SEARCH USING THE ACCOUNTS TAB IN THE HOME PAGE

1. In the **Accounts** tab, select an account type from the drop-down menu.

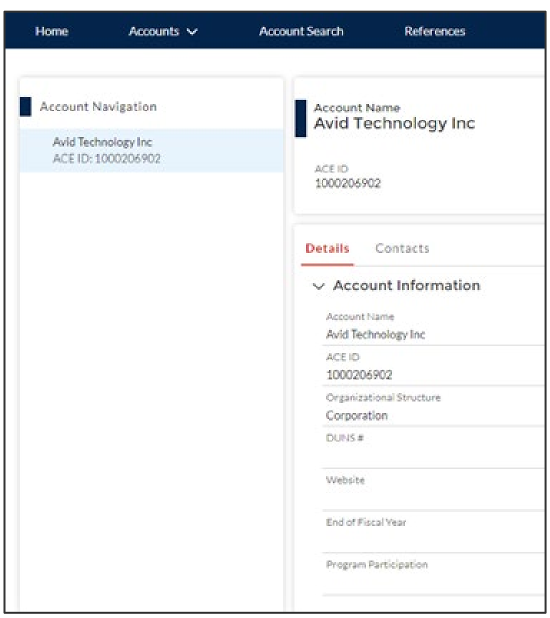


All your accounts for the account type selected display.

2. In the accounts page, in the **Account Name** column, select an account hyperlink.



The account details page and the **Details** tab display.



Topic 3: Create a New Account

Introduction

Trade Top Account Owners with authorized permissions can create Exporter, Protest Filer, and Vessel Agency accounts in the Modernized ACE Portal. Trade Account Owners can provide Proxy Account Owners with permission to add accounts (changes to user permissions are done in the Legacy Portal). You can also add the information from the Form 5106 to register the Importer of Record number.

The general steps to create an account are:

1. Select a top account to associate to the account you are creating.
2. Select which account type to create.
3. Add the account information.
4. Add the address information.
5. Add the contact information.
6. Review the added information.
7. Save the account.

IMPORTANT: For certain account types, additional information is added.

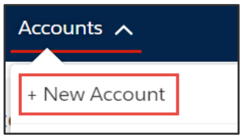
Create a New Account

IMPORTANT: The steps below show the general create process (select the top account and account type; add account, address, and contact information; then review and save) for **all** account types. Some account types require additional information beyond the general steps. Note that some steps only apply to the specific account type that is indicated at the beginning of the step.

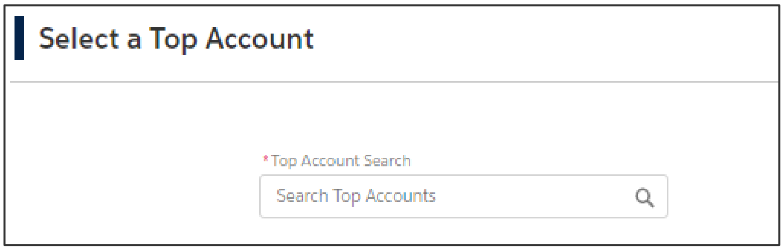
When <Account Type> is indicated in the steps, proceed based on the specific type of account that you are adding.

Select a Top Account and An Account Type

1. Select the **Accounts** tab drop-down menu and select the **+ New Account** option.



   The **Select a Top Account** pane displays.

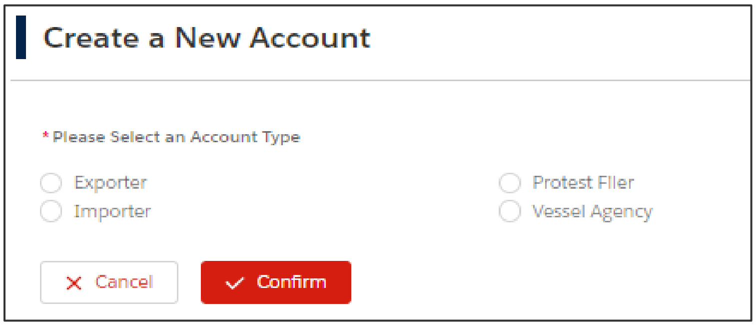


2. Select the ***Top Account Search** text field, and type a *partial or full top account name or ACE ID*.

   A drop-down menu of matching top accounts displays.

3. In the ***Top Account Search** drop-down menu, select the top account for the new account.

   The **Create a New Account** pane displays.



4. Select the radio button for the type of account to create.

   IMPORTANT: Selecting the **Importer Account Type** equates to completing the Form 5106 to register the Importer of Record (IR) number. This does not create an importer account and associate it to the top account.

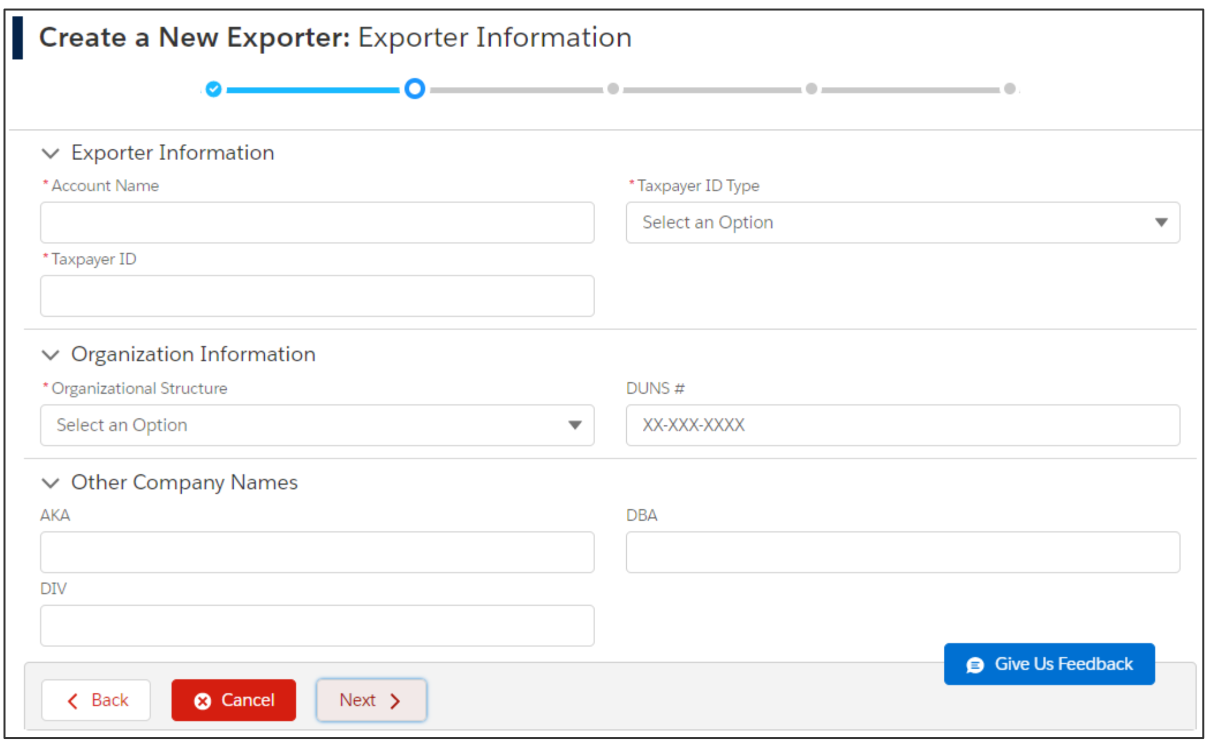
5. Select the ✓**Confirm** button.

Add Account Information

6. In the **Create a New <Account Type>: <Account Type> Information** pane, in the **<Account Type> Information** section, complete the appropriate account information fields.

   NOTE: Fields with an asterisk are required.

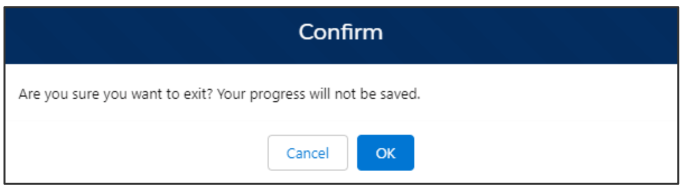
   For EIN Taxpayer ID, use format NN-NNNNNNN.



7. If applicable, in the **Organization Information** section:
   a. Select the ***Organizational Structure** drop-down menu and select an option.
   b. For an **Exporter** account, if applicable, in the **DUNS #** field, type a *DUNS number* in NN-NNN-NNNN format.
8. If applicable, in the **Other Company Names** section, in the **AKA**, **DBA**, and **DIV** fields, type *other company name(s)* as appropriate.
9. For a **Vessel Agency** account, in the **Account Status** section, select the ***Status** drop-down menu and select a status option.
10. Select the **Next >** button.

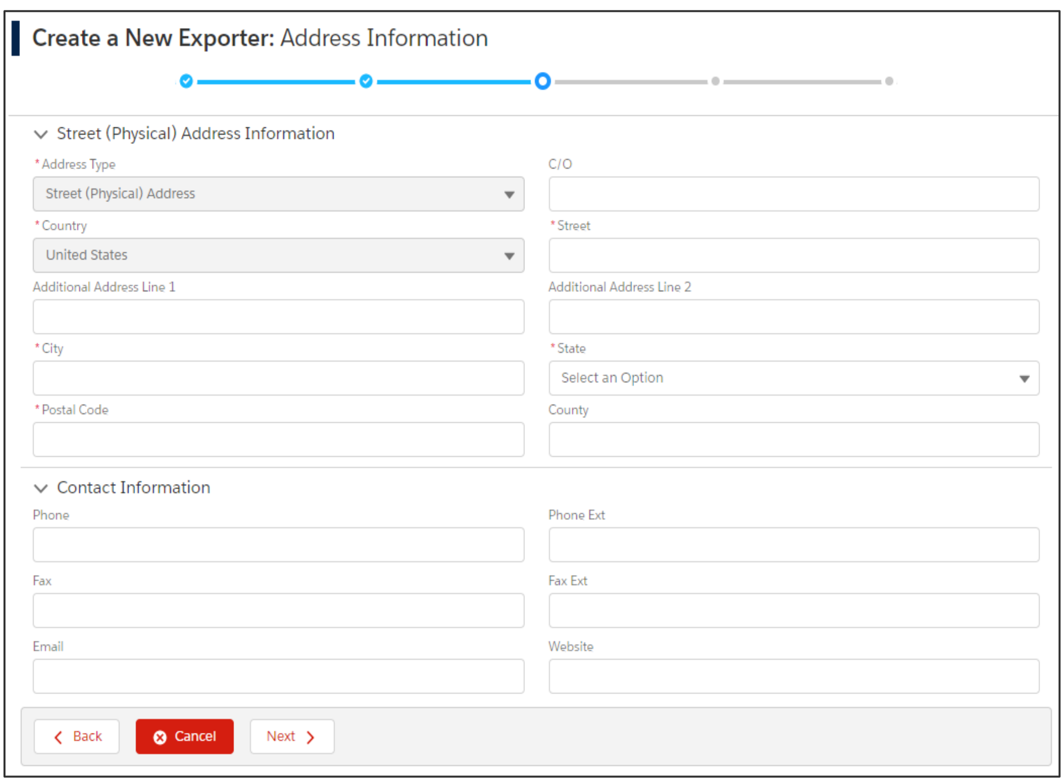
NOTE: Select the **< Back** button to return to the prior pane.

Select the **Cancel** button to cancel adding a new account and select the **OK** button in the confirmation dialog box.



Add Address Information

11. In the **Create a New <Account Type>: Address Information** pane, in the **Street (Physical) Address Information** section, complete the appropriate physical street address fields.



NOTE: The ***Address Type** field and address section title may vary depending upon the account type. The ***Address Type** field is prefilled by default and not editable. The ***Country** field may also be prefilled by default and not editable, depending upon the account type.

12. In the **Contact Information** section, complete the appropriate fields for a contact at the address.

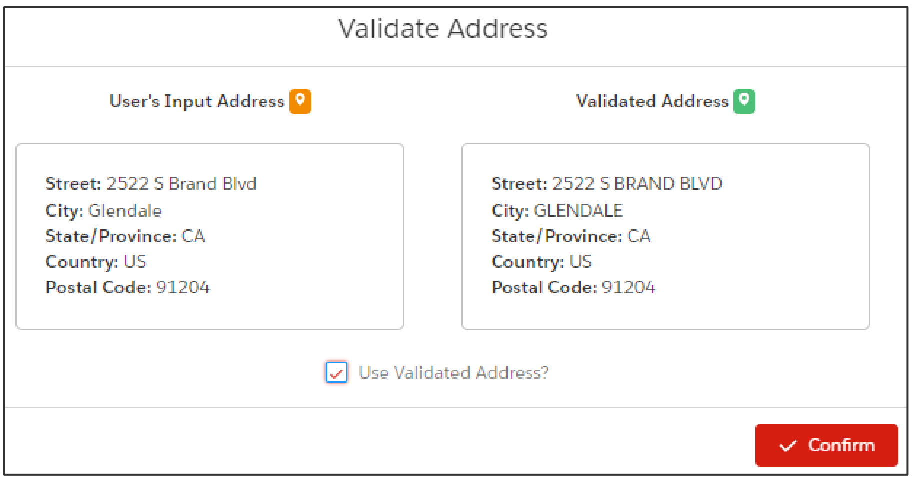
    NOTE: The **Website** field must begin with https://.

13. For an **Importer** account, in the **Mailing Address Information** and **Contact Information** sections, complete the appropriate mailing address and contact fields.

    NOTE: Select the **Use as Mailing Address** checkbox in the upper right to duplicate the **Physical Address** and **Contact** fields into the **Mailing Address** and **Contact** fields.

14. Select the **Next >** button.

    The **Validate Address** dialog box displays.

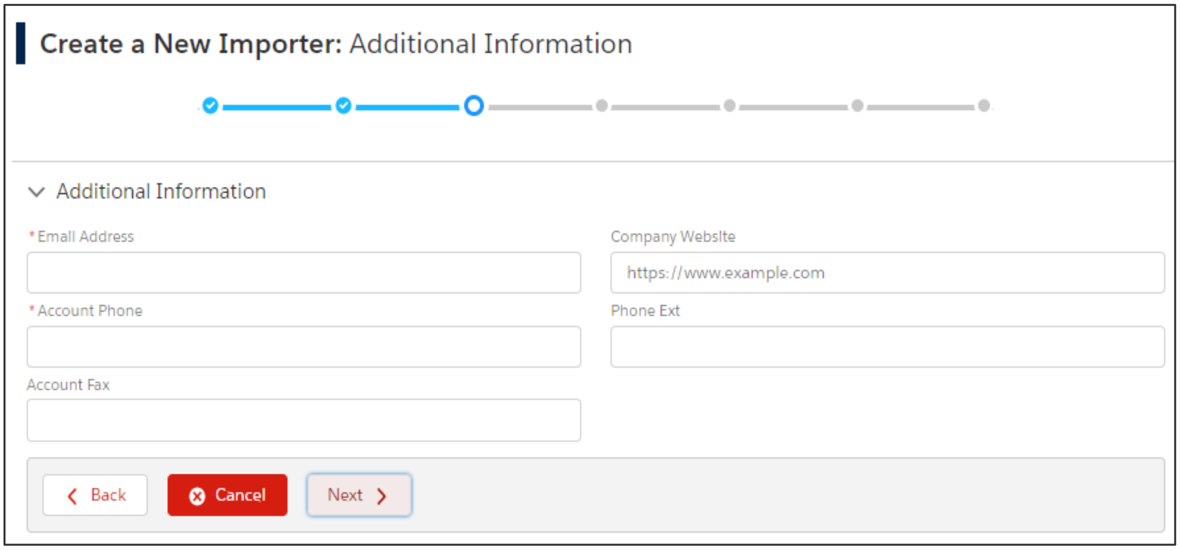


NOTE: The **Validate Address** dialog box may display again if multiple addresses were entered.

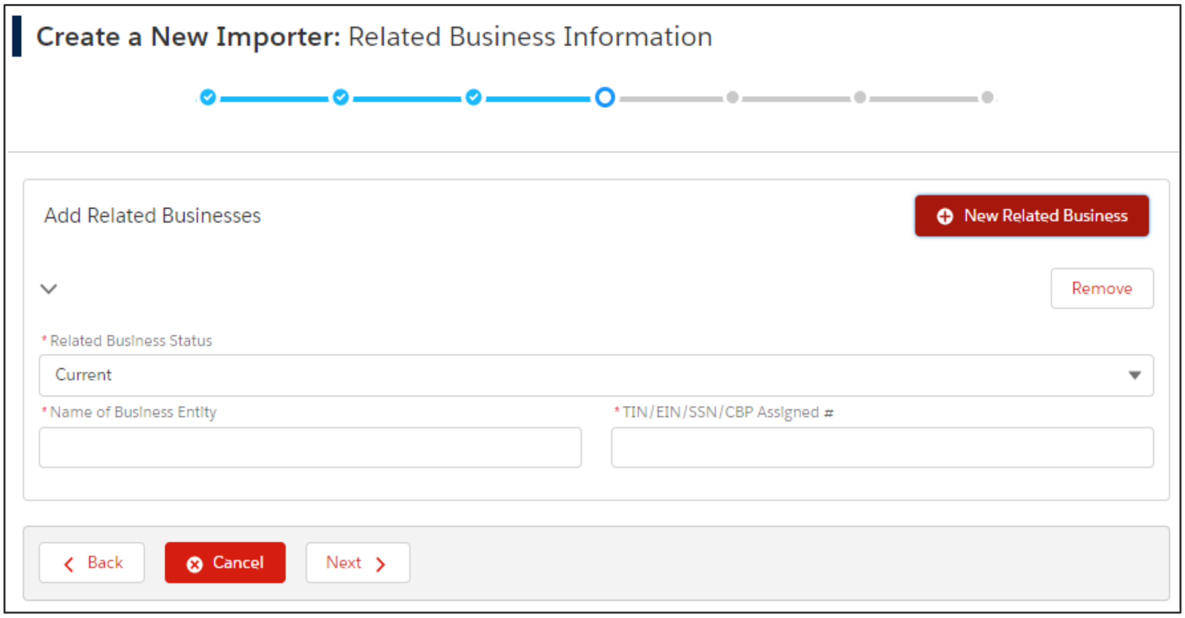
15. Select the **Confirm** button to confirm the validated address(es).

For an **Importer** account, review and complete the **Additional Information**, **Related Business Information**, **Banking & Company Information**, and **Certification Information** panes as appropriate (steps 16-22):

16. In the **Create a New Importer: Additional Information** pane, in the **Additional Information** section, complete the appropriate fields.



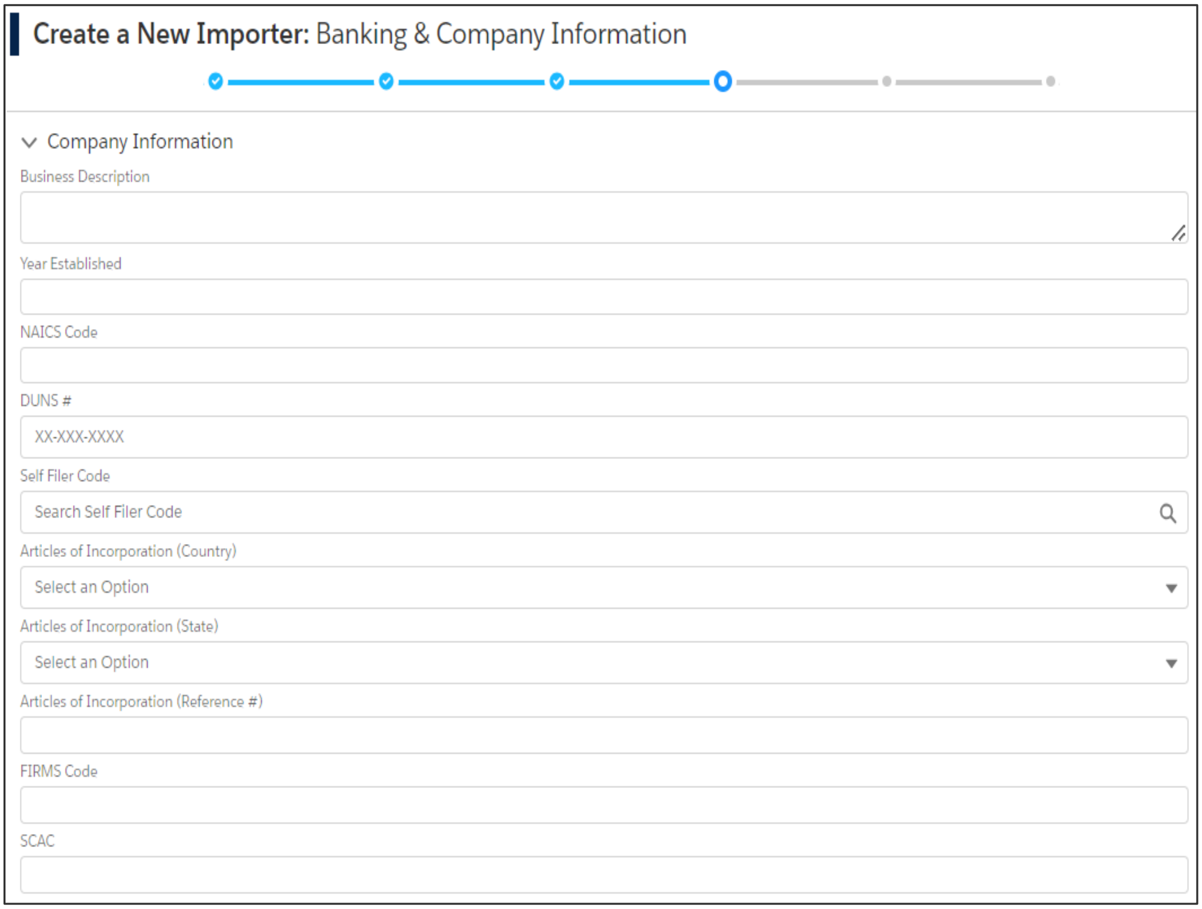
17. Select the **Next >** button.
18. To add related business information, in the **Create a New Importer: Related Business Information** pane, in the **Add Related Businesses** section, select the **New Related Business** button.
19. If applicable, in the expanded **Add Related Businesses** section:



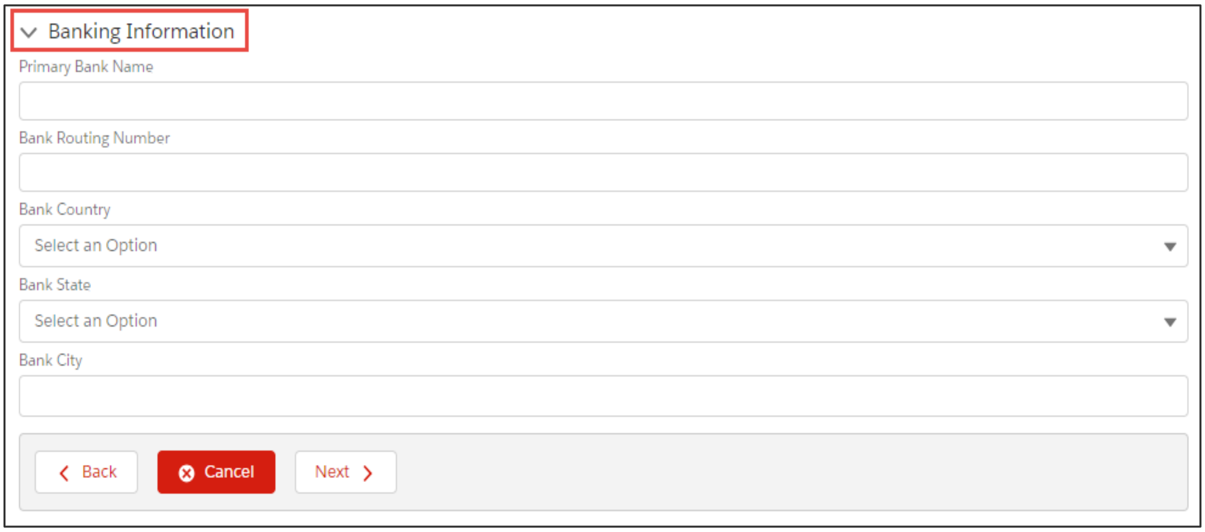
   a. Complete the appropriate fields.
   b. Select the **Next >** button.

NOTE: Select the **Remove** button to exit without saving the related business information.

20. If applicable, in the **Create a New Importer: Banking & Company Information** pane:



a. In the **Company Information** section, complete the appropriate fields.

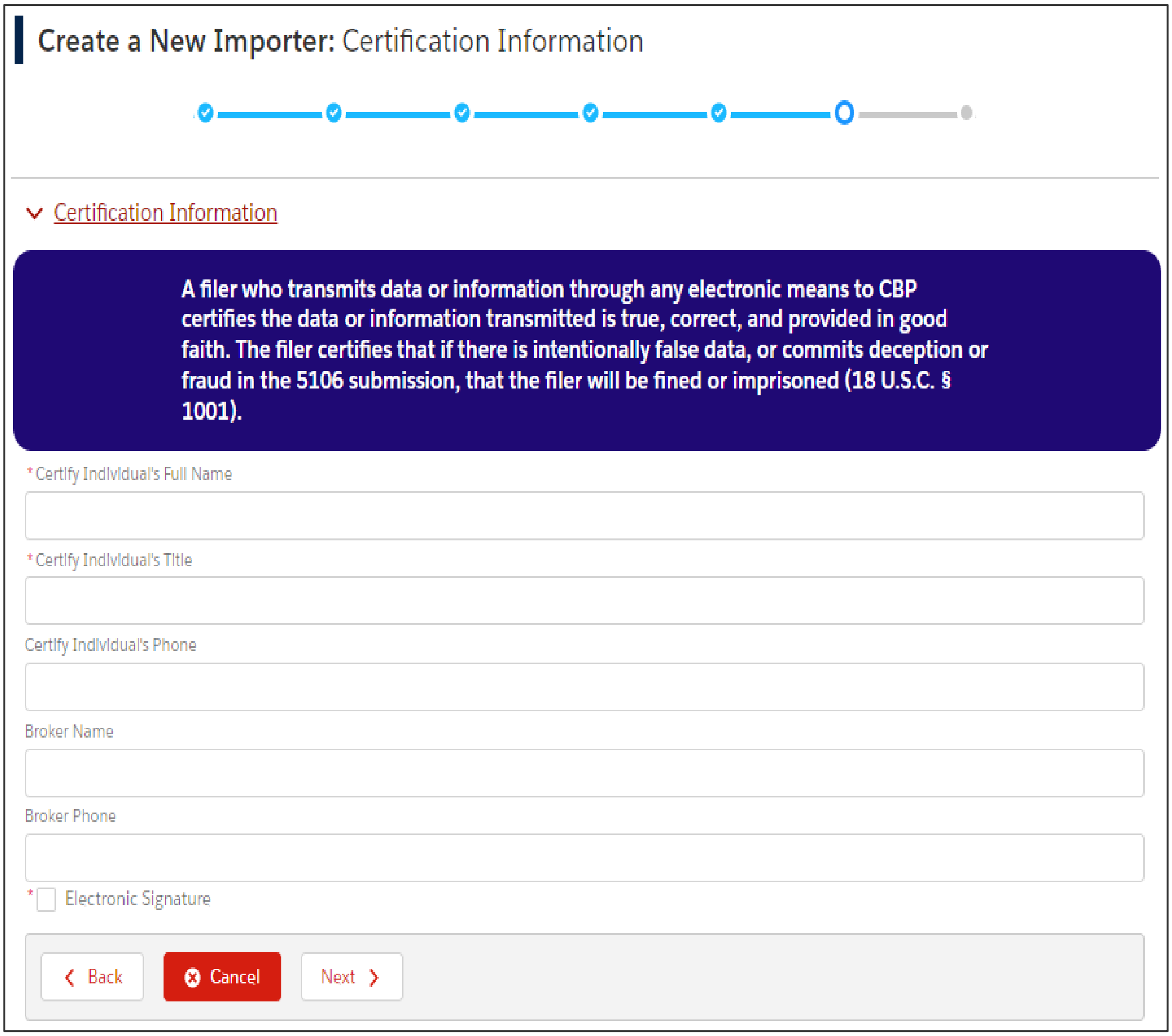


b. In the **Banking Information** section, complete the appropriate fields.

c. Select the **Next >** button.

21. In the **Create a New Importer: Certification Information** pane, select the **Expand** icon > to the left of the **Certification Information** title to expand the section.

22. In the expanded **Certification Information** section:



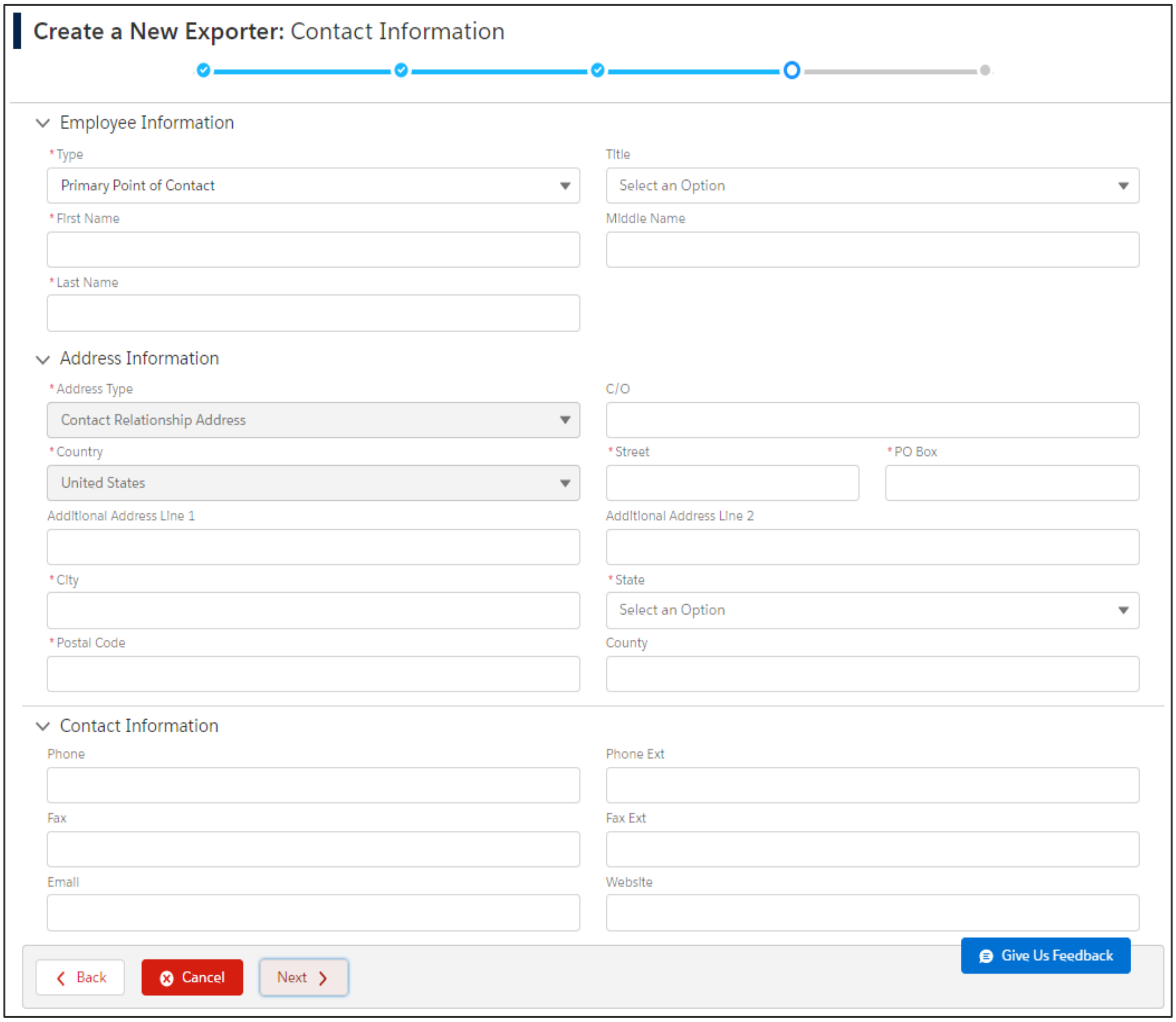
a. Complete the appropriate fields.

b. Select the **Electronic Signature** checkbox.

c. Select the **Next >** button.

Add Contact Information (except Importer)

23. In the **Create a New <Account Type>: Contact Information** pane, in the **Employee Information** section:



NOTE: The ***Type** field is prefilled with the required **Primary Point of Contact** by default.

a. In the ***First Name** and ***Last Name** fields, type the *first and last name* of the primary point of contact.

b. If applicable, in the **Title** drop-down menu, select a title option.

c. If applicable, in the **Middle Name** field, type a *middle name*.

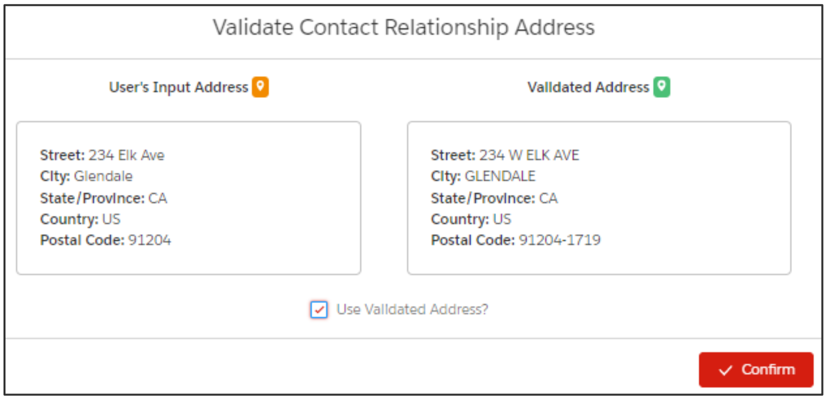
24. In the **Address Information** section, complete the appropriate address fields for the primary point of contact.

NOTE: The ***Address Type** and ***Country** fields are prefilled by default and may not be editable.

25. In the **Contact Information** section, complete the appropriate contact fields for the primary point of contact.

26. Select the **Next >** button.

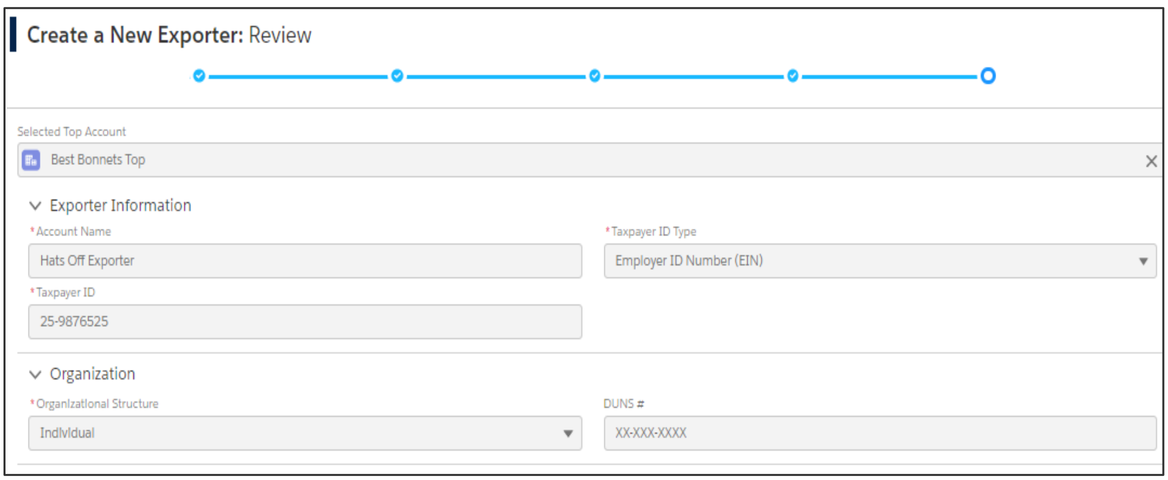
The **Validate Contact Relationship Address** dialog box displays.



27. Select the **Confirm** button to confirm the validated address.

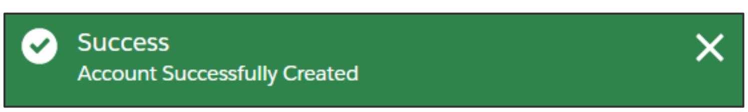
Review Added Information

28. In the **Create a New <Account Type>: Review** pane, review the added account information, scrolling down to review all fields.



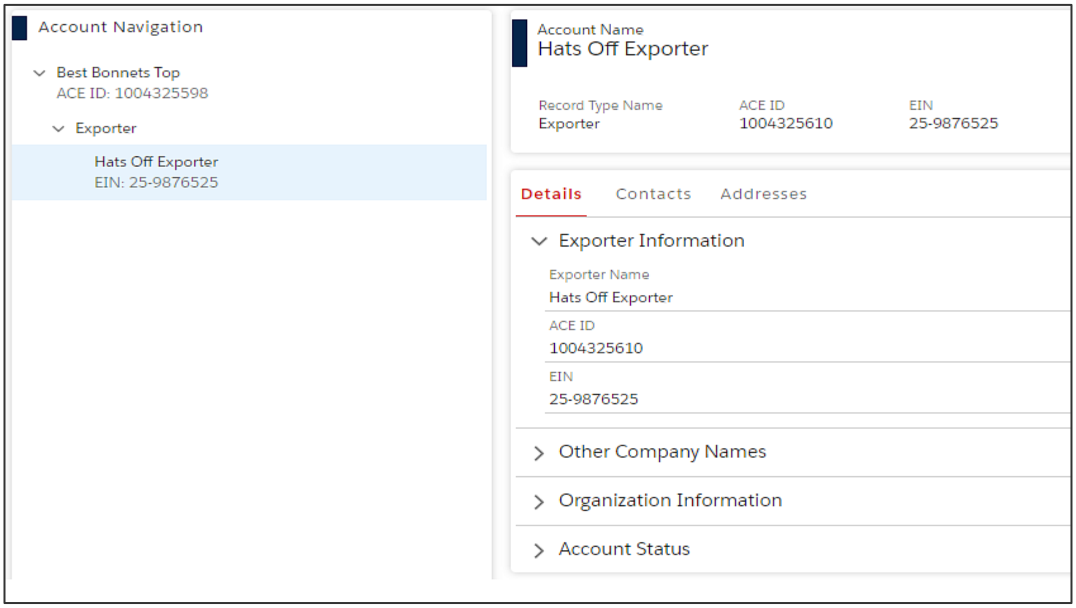
29. Select the **Save** button to save the added account.

The **Account Successfully Created** message displays.



The associated top account and new account display in the left **Account Navigation** pane and the **Account Name** and account information display on the right.

IMPORTANT: The importer account does not display to the left; the add process registers the IR number. To add the importer account to your top account, follow the instructions on cbp.gov **Adding Sub-Account Types or Account Identifiers to an Existing ACE Portal Account** on the [Managing an ACE Secure Data Portal Account] page.



NOTE: Use the **< Back** button if needed to navigate to previous sections to update information. Then, select the **Next >** button to return to the **Review** pane and select the **Save** button.

Select the **Cancel** button to cancel adding the account.

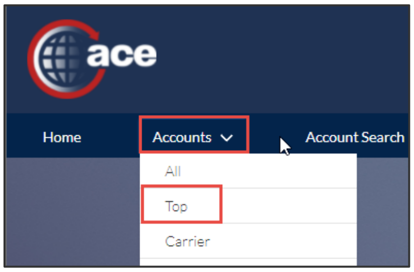
Topic 4: Locate and Edit a Top Account

Introduction

You can locate and edit information in your Top Accounts in the Modernized ACE Portal.

Locate and Edit Details for a Top Account

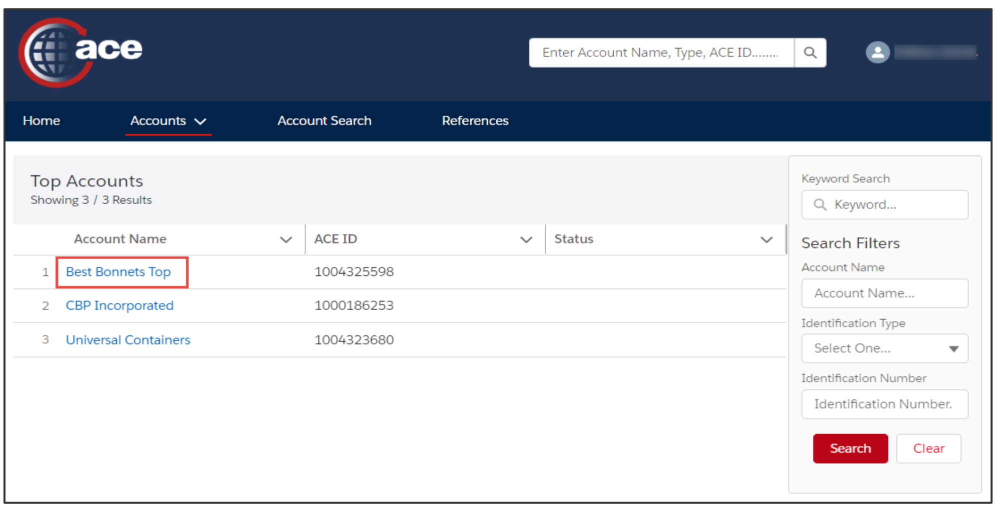
1. In the **Accounts** tab, select **Top** from the drop-down menu.



Your top accounts display.

TIP: If you know the name of the Top Account, type it in the **Global Search** field. If you recently viewed the Top Account, select it from the **Recently Viewed Accounts** pane.

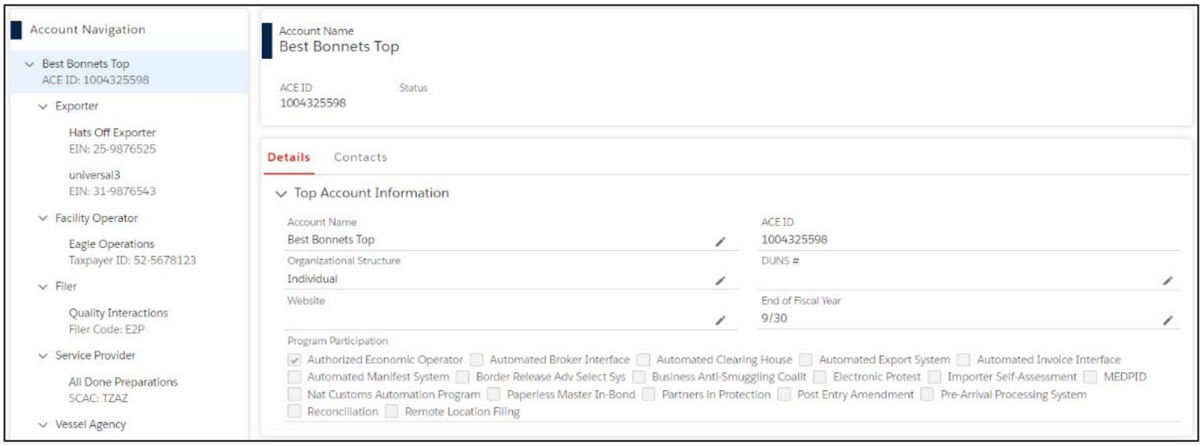
2. In the **Top Accounts** page, in the **Account Name** column, select a top account name hyperlink.



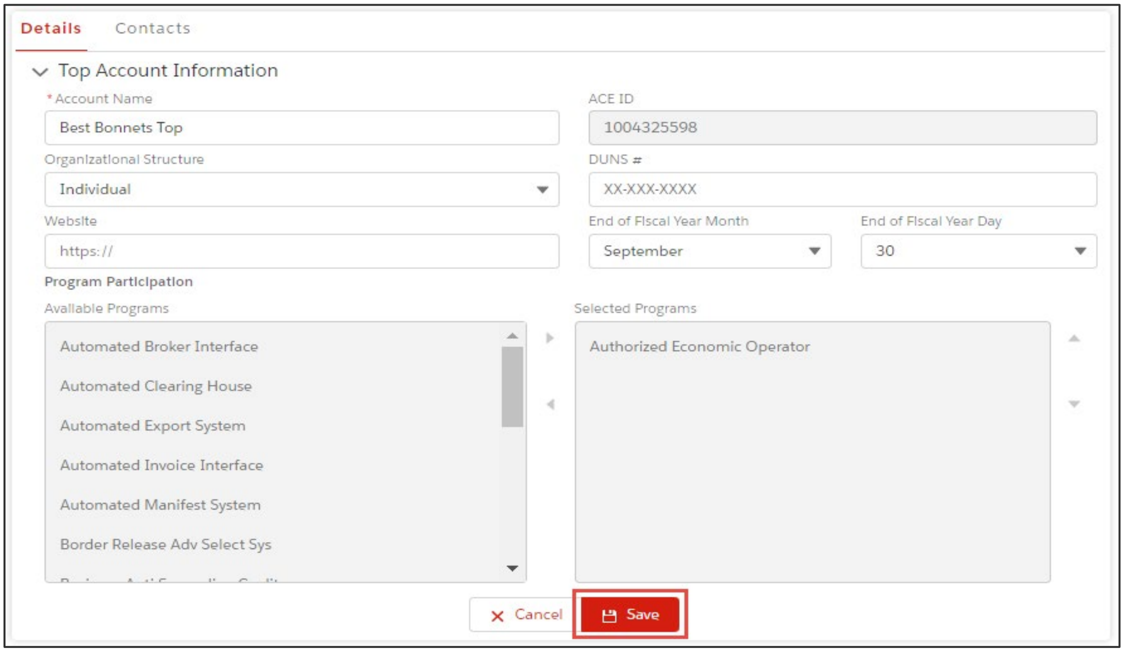
The **Account Details** page displays.

NOTE: Use the **Search Filters** pane to filter the list of Top Accounts. In the **Keyword Search** field, search by typing an account whole or partial name and select the **Search** button. A wild card character is not required. All records with the keyword in the name will display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.

3. In the **Details** tab, select the **Edit** icon in any field.



4. In the edit pane:



a. Select a field.

b. Edit the information.

NOTE: Grayed out fields are not editable.

c. Repeat for other fields, as necessary.

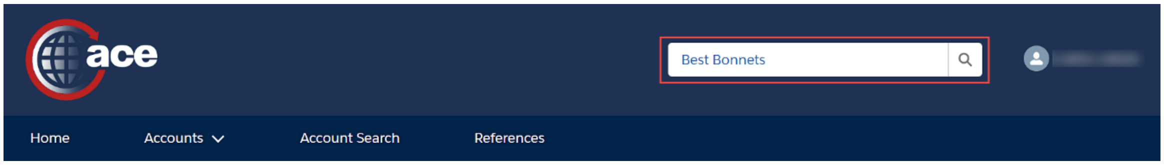
d. Select the **Save** button.

The **Account Details** pane displays with the edited information.

IMPORTANT: Any edits you make in the Modernized ACE Portal are visible in the Legacy ACE Portal.

LOCATE AND EDIT ADDRESS INFORMATION FOR A CONTACT OF A TOP ACCOUNT

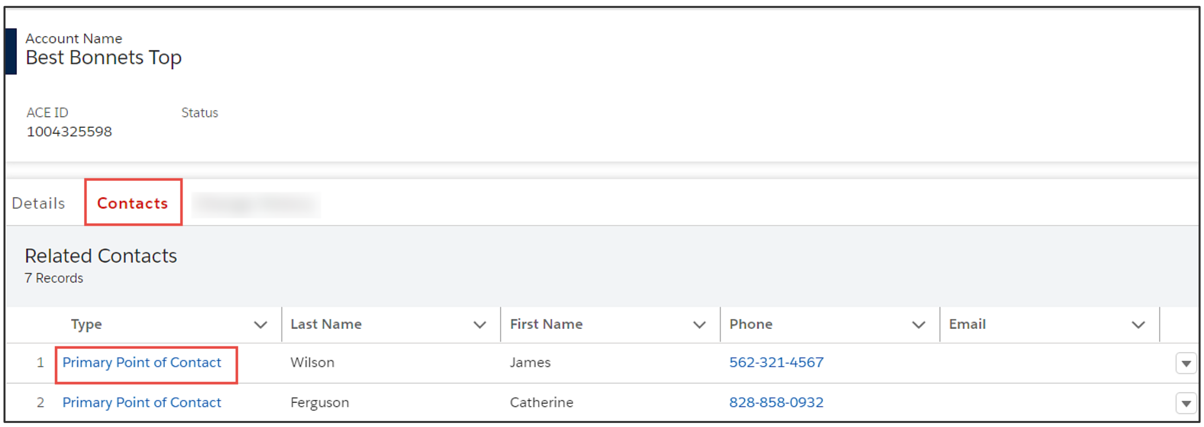
1. Locate a Top Account.



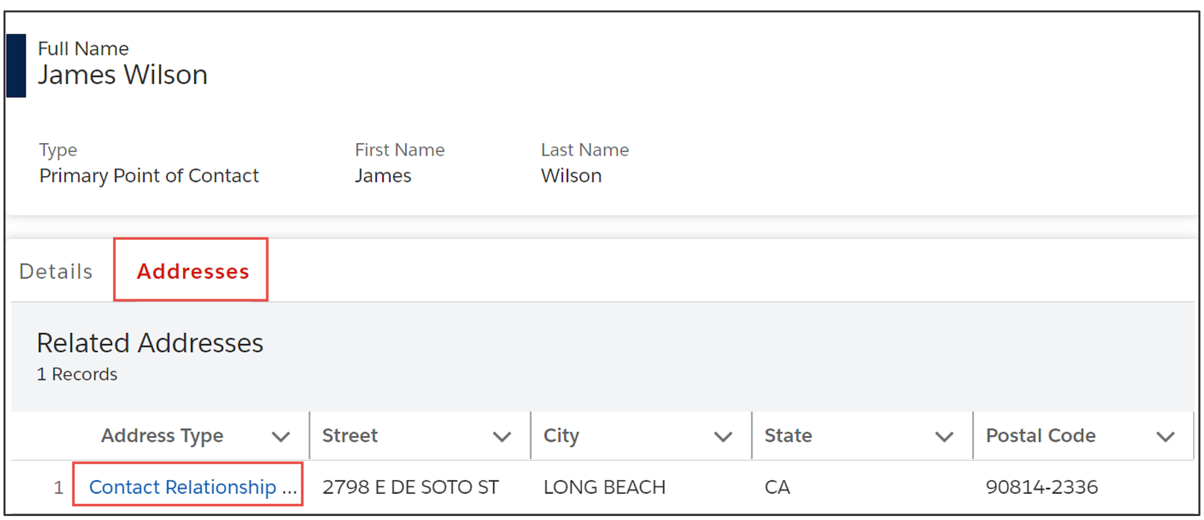
TIP: You can select the **Accounts** drop-down menu and select Top Account, then select the account in the list that displays. If you recently viewed the top account, select it in the **Recently Viewed Accounts** list.

2. In the **Account Name** section, select the **Contacts** tab.

   The **Related Contacts** display.



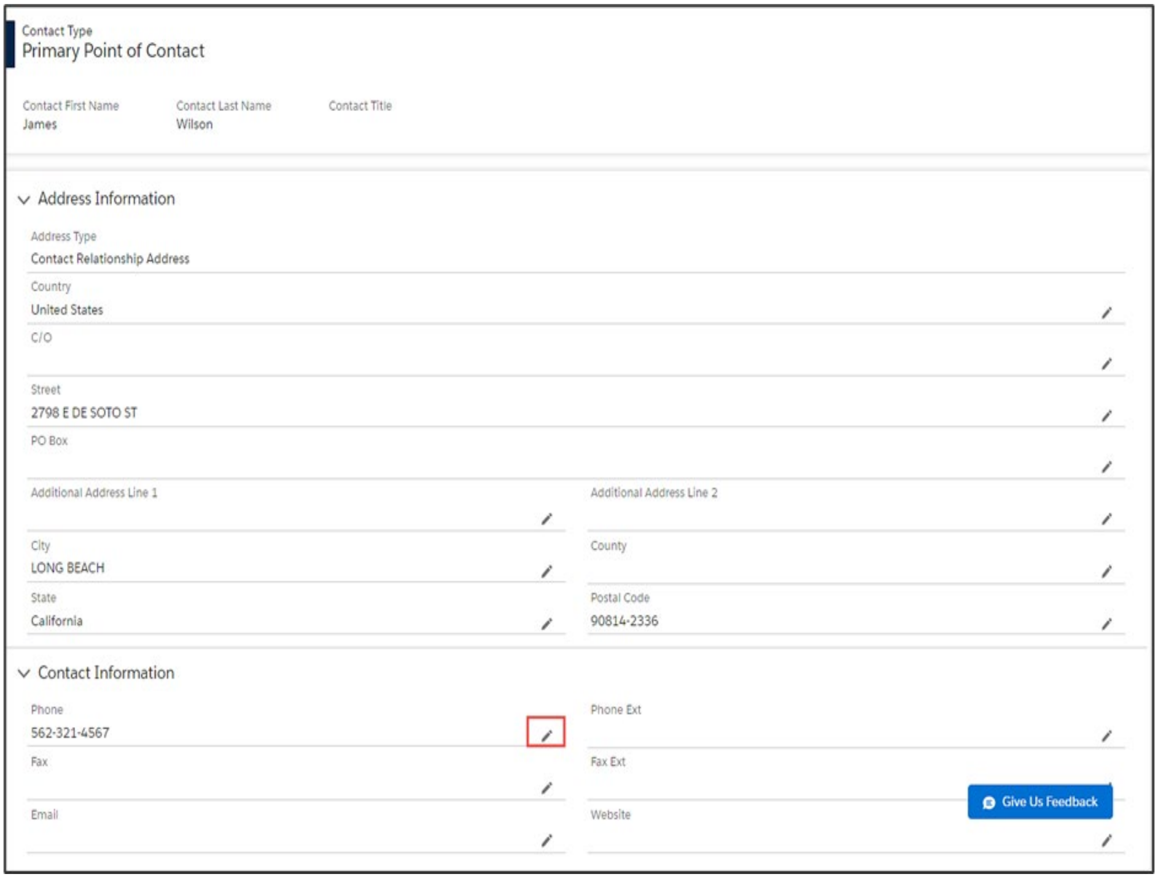
3. In the **Type** column, select the contact hyperlink.
4. In the pane that displays:



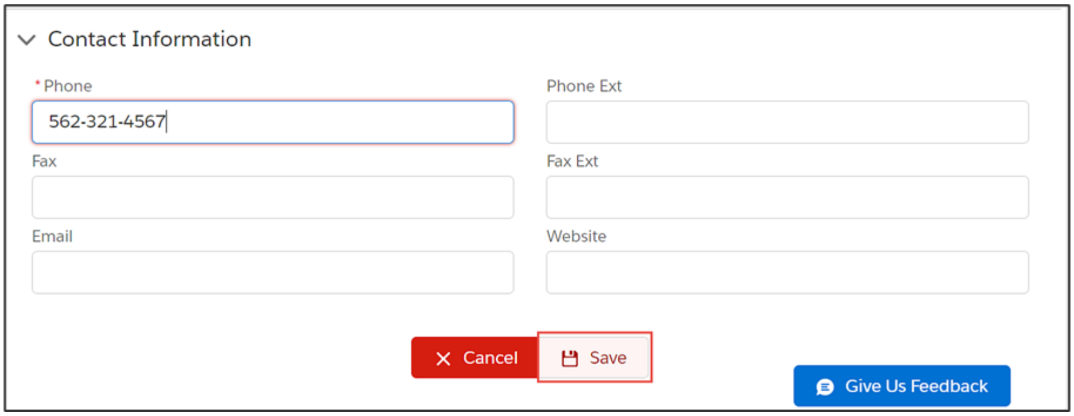
   a. Select the **Addresses** tab.
   b. In the **Address Type** column, select the **Address Type** hyperlink.

5. In the pane that displays:

   a. Select an **Edit** icon.



   b. In the appropriate field(s), complete the information.



NOTE: You must enter fields with an asterisk that are blank.

   c. Select the **Save** button.

Topic 5: Locate and Edit Subaccount Information

Introduction

Trade Top Account Owners with authorized permissions can view and edit subaccount information. In the Legacy ACE Portal, Trade Account Owners can provide Proxy Account Owners with permission to view and edit subaccounts.

Accounts may include additional tabs of supporting data to view and edit based on permissions associated with an account type. For example, permissions associated with a facility account type allow users to view, add, and edit document folders and documents, employees, and officials.

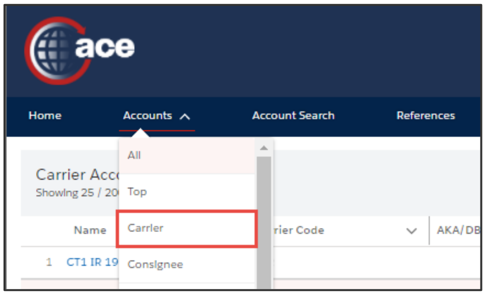
Reference the **Ocean Conveyances Trade QRG** for details to process ocean conveyances in a carrier account.

Reference the **Blanket Declarations QRG** for details to search for, add, print, and cancel declarations in an importer account or an organizational broker account on behalf of an importer without an account.

View and Edit Subaccount Information

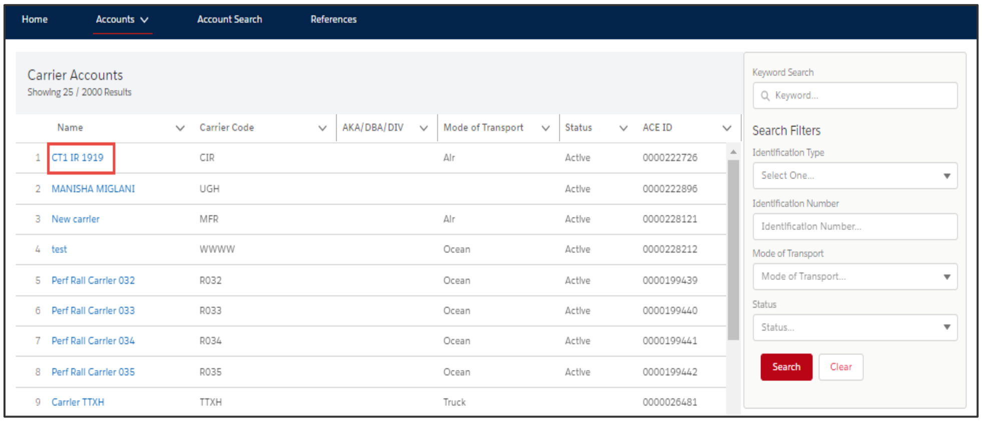
IMPORTANT: The steps below show the general process to view, edit, and add supporting data for subaccounts. Some account types require additional steps for additional subtabs beyond the general steps. Note that some steps only apply to the specific account type that is indicated at the beginning of the step.

1. In the **Accounts** tab, select a record type from the drop-down menu.



TIP: If you know the name of the record, type it in the **Global Search** field. Use the **All** drop-down menu at the top left to indicate the type of account to narrow the list.

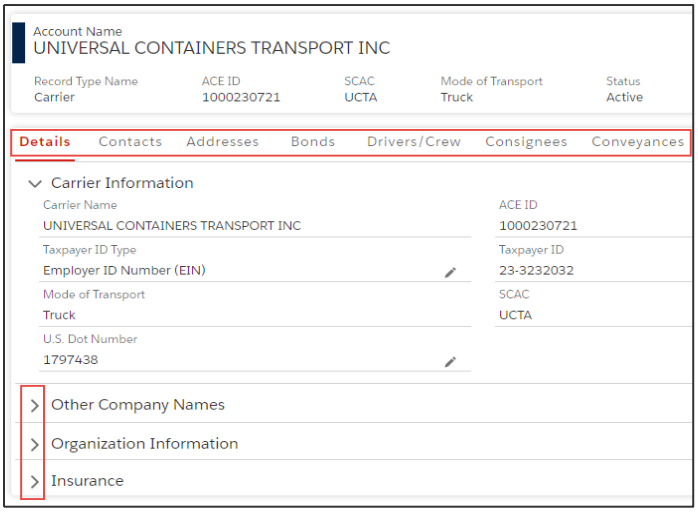
2. In the accounts page that displays, in the **Name** column, select an account name hyperlink.



The **Account Details** page displays.

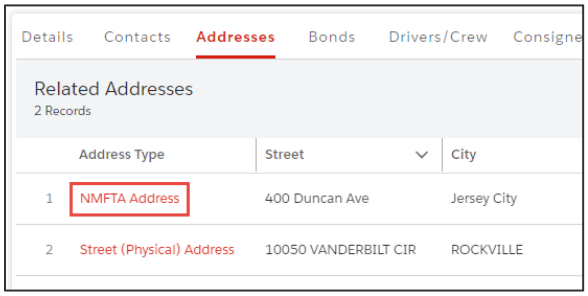
NOTE: Use the **Search Filters** pane to filter the list of accounts. In the **Keyword Search** field, type whole or partial words and select the **Search** button to search for accounts. A wild card character is not required. All records with the keyword in the name display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.

3. In the **Account Name** pane, select a tab.

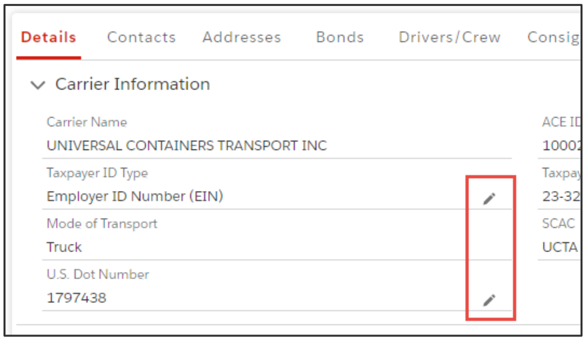


NOTE: The tabs available depend on the type of subaccount selected. You can expand and collapse sections to show/hide account information.

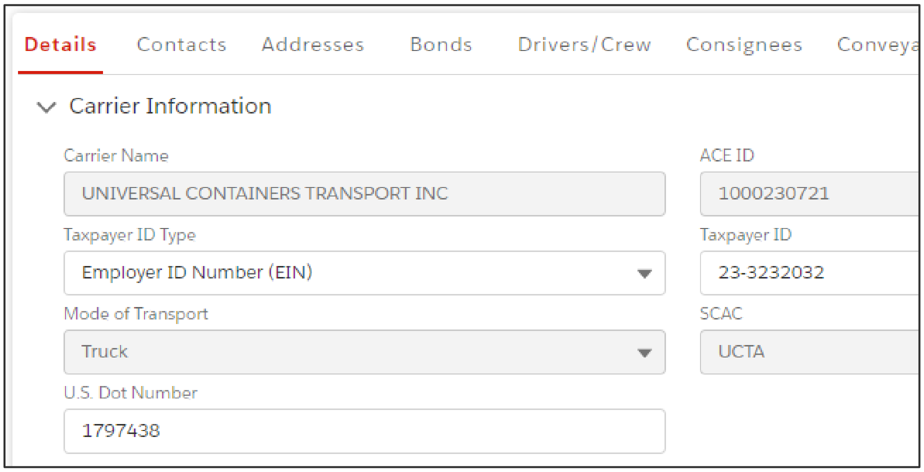
4. If applicable, select a hyperlink in the first column to display the detailed information.



5. Select the **Edit** icon.



6. In the edit pane:



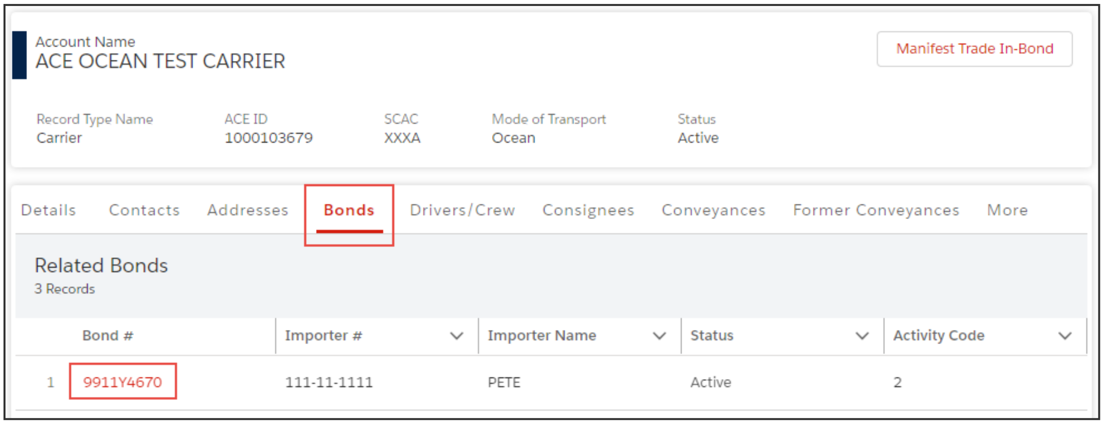
   a. Select a field.
   b. Edit the information.

      NOTE: Grayed out fields are not editable.

   c. Edit other fields, as necessary.
   d. Select the **Save** button.

<u>In a **Carrier** account</u>, for users with permission to view bond information and process ocean conveyances (steps 7-8):

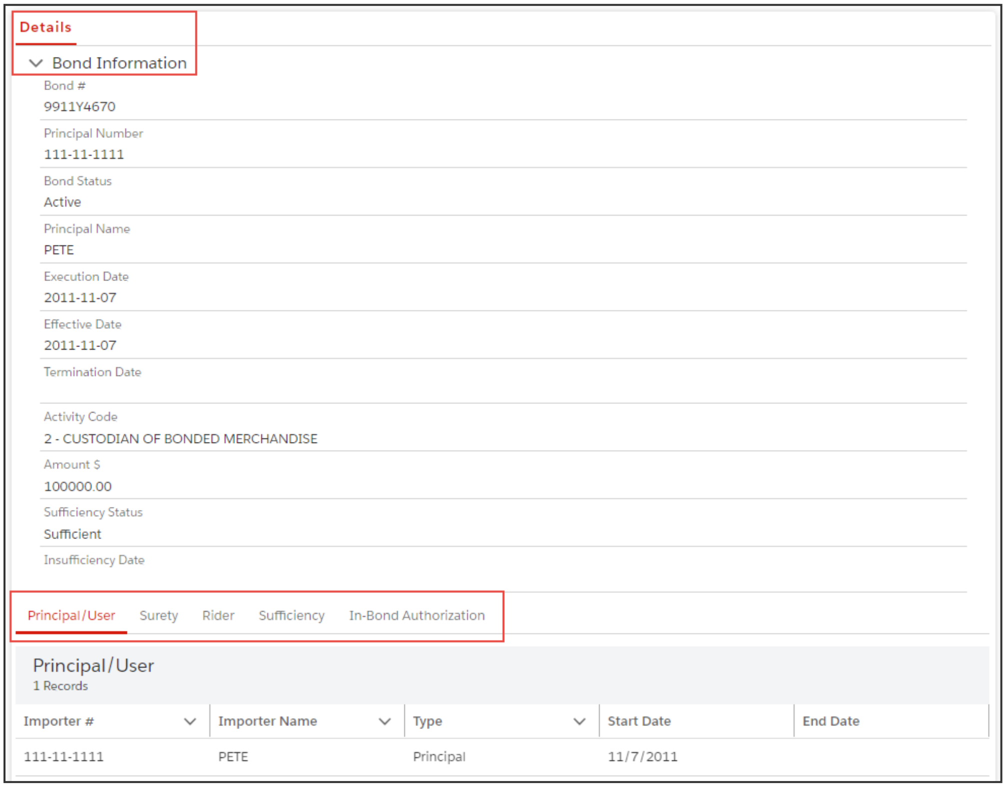
7. Select the **Bonds** tab to view the bonds.



NOTE: The bond information is provided by the eBond application.

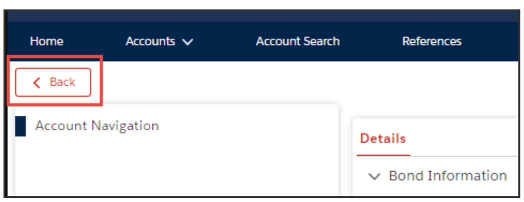
   a. Select the **Bond #** hyperlink.

      The bond details and subtabs of additional information display.

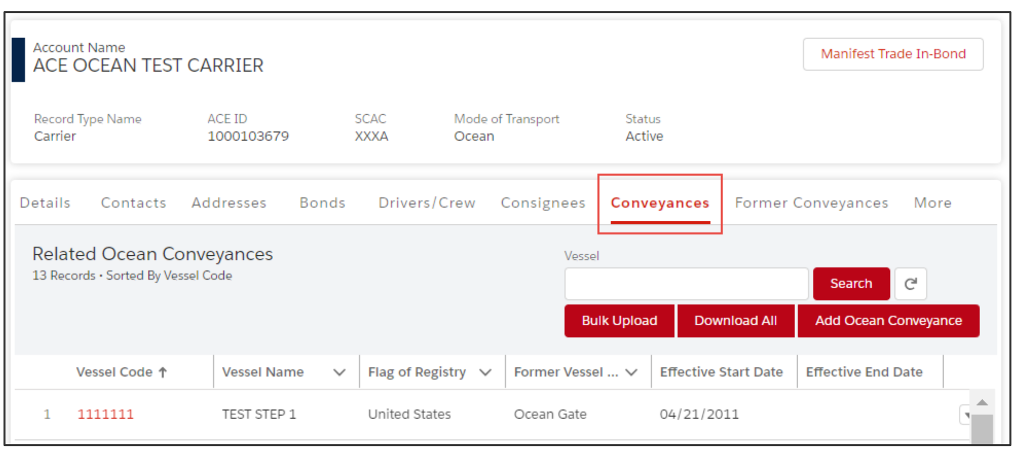


b. Select a subtab to display additional information.

c. Select the **< Back** button to return to the carrier account information.



8. Select the **Conveyances** tab to process ocean conveyances.

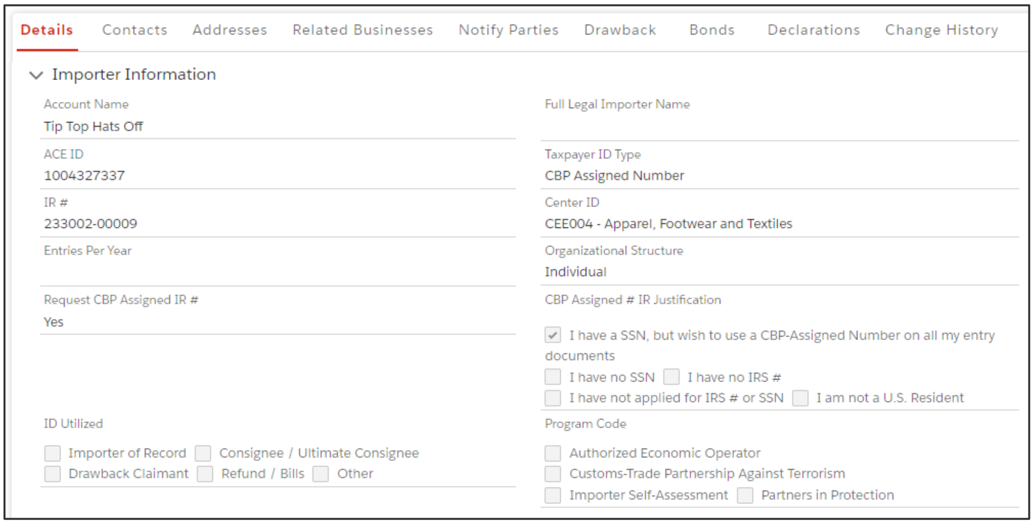


Reference the [Ocean Conveyances Trade QRG] for information and steps to complete ocean conveyances actions.

For **Organizational Broker** account users with permissions to perform blanket declaration tasks, reference the **[Blanket Declarations QRG]** for steps to complete blanket declaration search, add, print, and cancel actions.

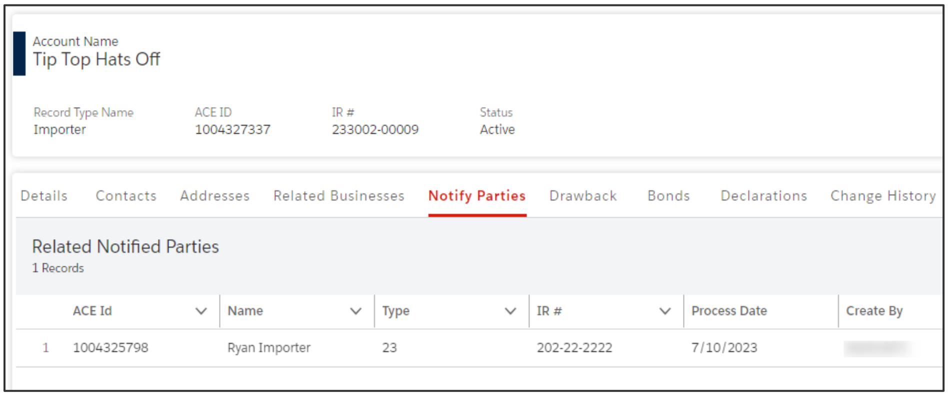
In an **Importer** account, for users with permission to view importer details, notify parties, drawback privileges, and bonds; and search, add, print, and cancel declarations (steps 9-14):

9. Select the **Details** tab to view the importer information.

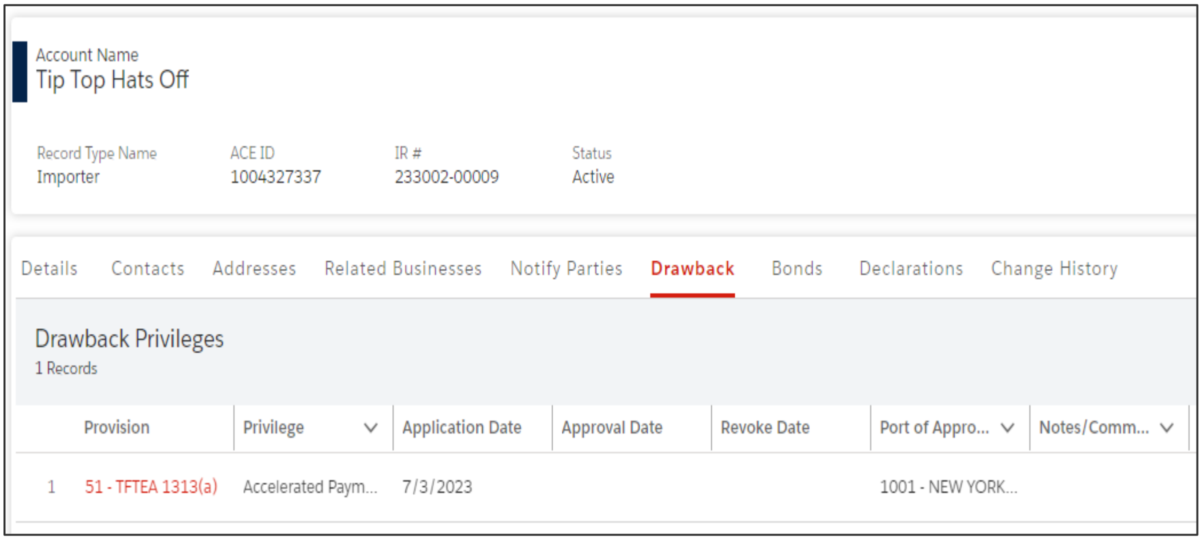


10. In the **Details** tab, select the **Expand** icon > to expand sections for additional details.

11. Select the **Notify Parties** tab to view the notify parties.

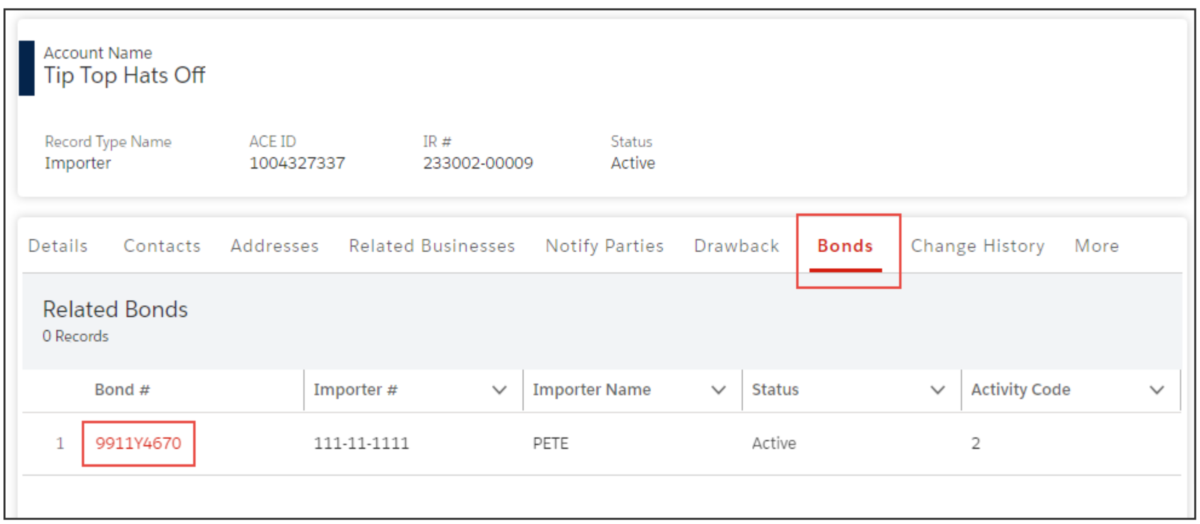


12. Select the **Drawback** tab to view the drawback privileges.



NOTE: Select the **Provision** hyperlink to display the drawback privilege information in the **Drawback Detail** pane.

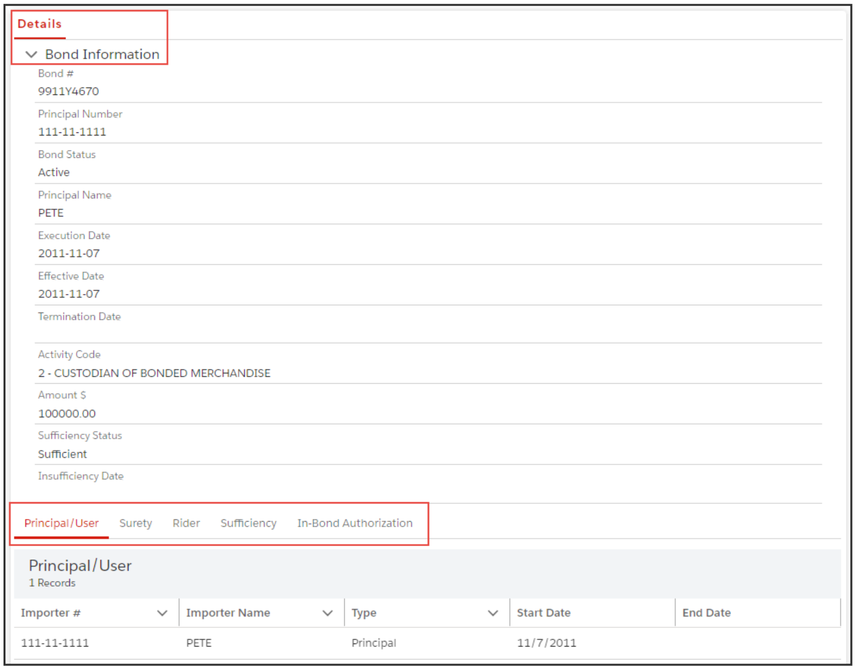
13. Select the **Bonds** tab to view the bonds.



NOTE: The bond information is provided by the eBond application.

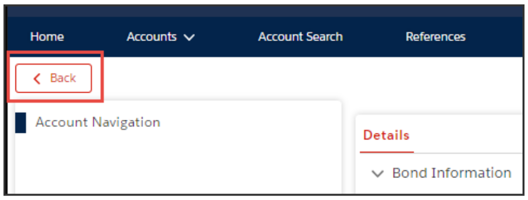
a. Select the **Bond #** hyperlink.

The bond details and subtabs of additional information display.



b. Select a subtab to display additional information.

c. Select the **< Back** button to return to the importer account information.

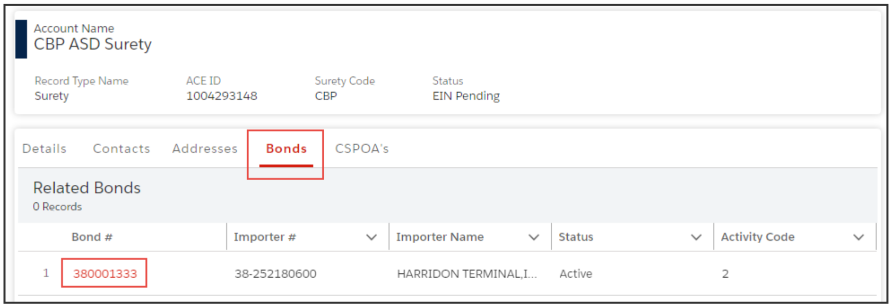


14. Select the **Declarations** tab to search for, add, print, and cancel declarations.

    Reference the [Blanket Declarations QRG](#) for information and steps to complete blanket declaration actions.

<u>In a **Surety** account</u>, for users with permissions to view bonds; and view and edit power of attorney information (steps 15-18):

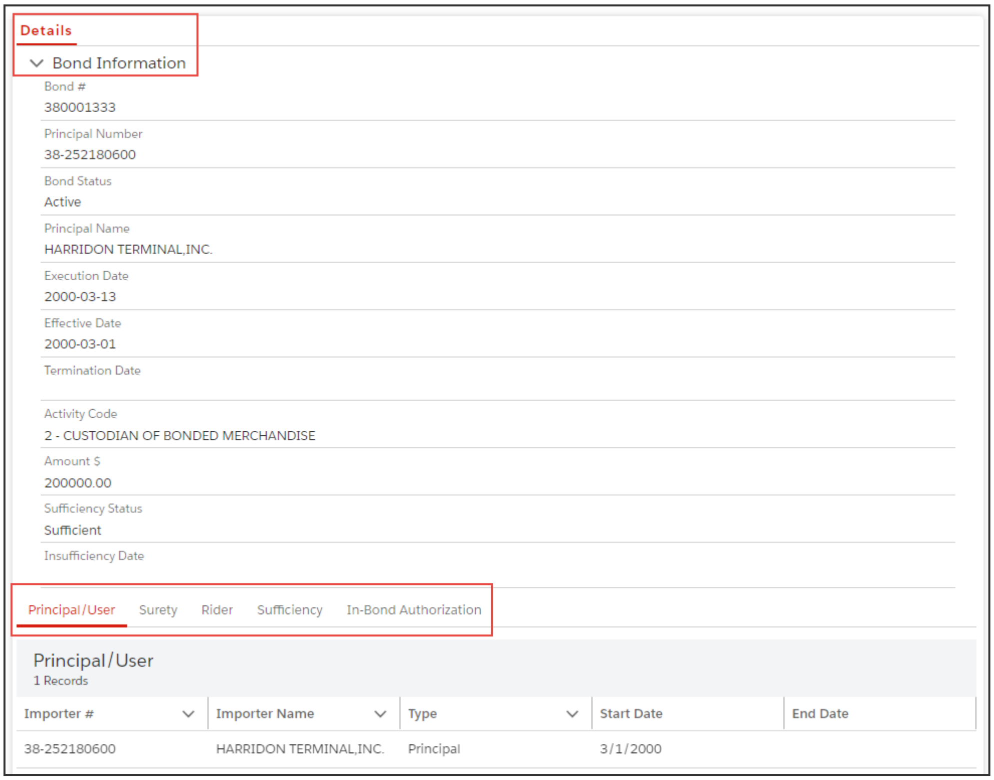
15. Select the **Bonds** tab to view the bonds.



NOTE: The bond information is provided by the eBond application.

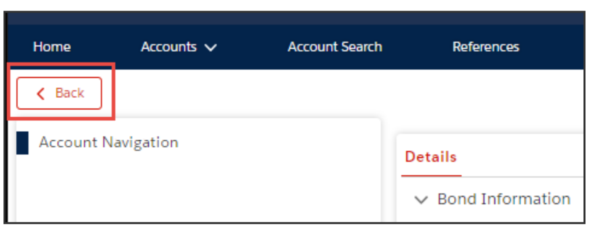
a. Select the **Bond #** hyperlink.

The bond details and subtabs of additional information display.

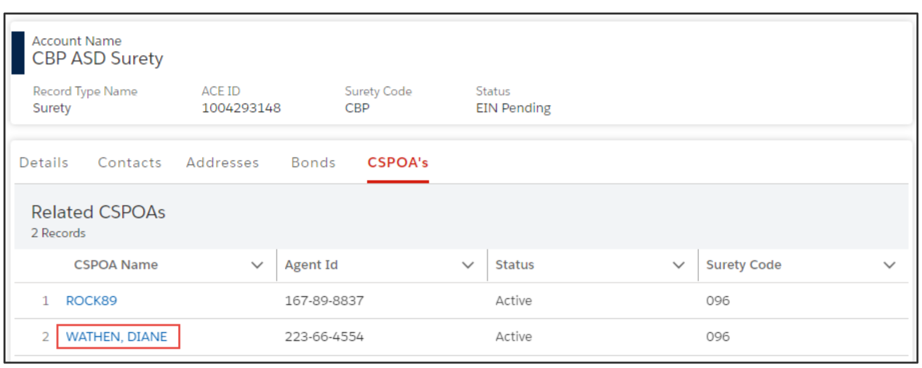


b. Select a subtab to display additional information.

c. Select the **< Back** button to return to the carrier account information.

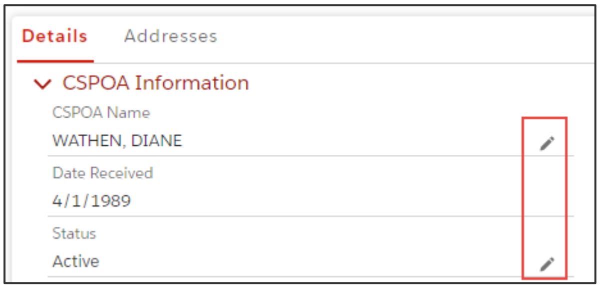


16. Select the **CSPOA's** tab to view the power of attorneys list.

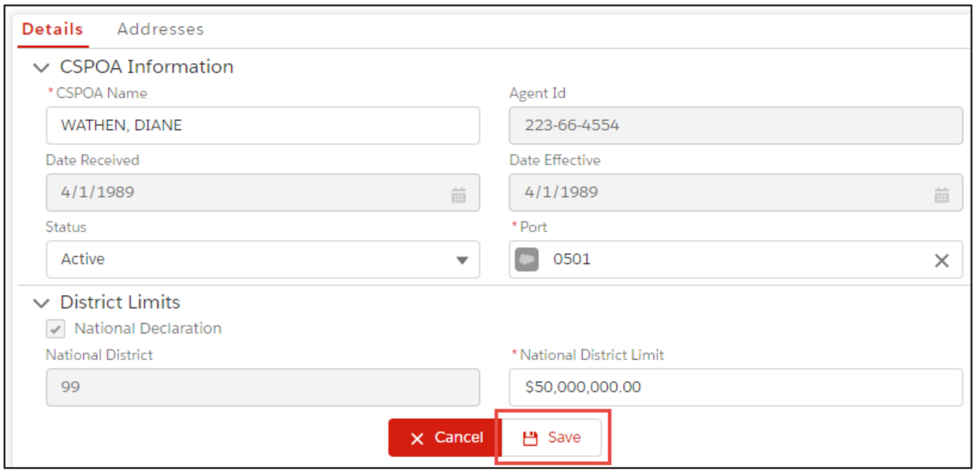


17. Select the **CSPOA Name** hyperlink to display the power of attorney information.

18. If applicable, select the **Edit** icon.



a. In the edit pane, update the appropriate fields.

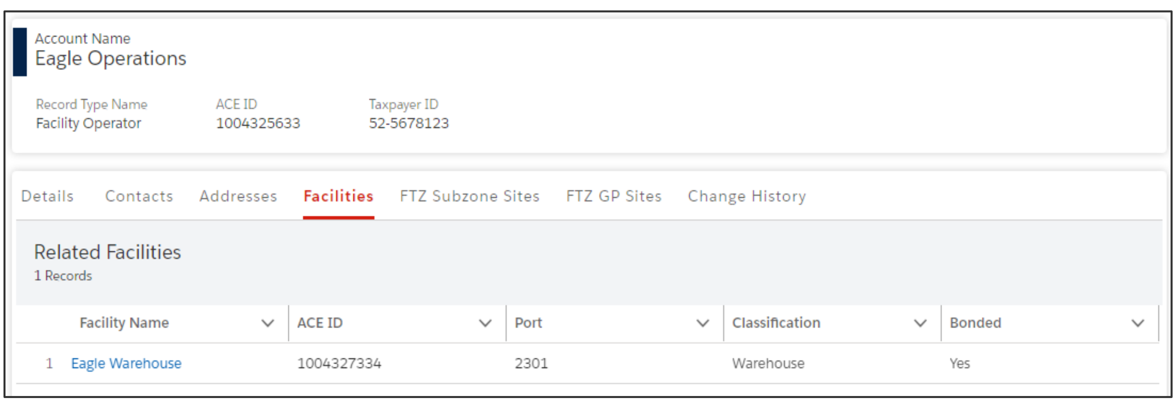


NOTE: Grayed out fields are not editable.

b. Select the **Save** button.

<u>In a **Facility Operator** account</u>, for users with permissions to view their facilities, FTZ subzone sites, and FTZ GP sites (steps 19-21):

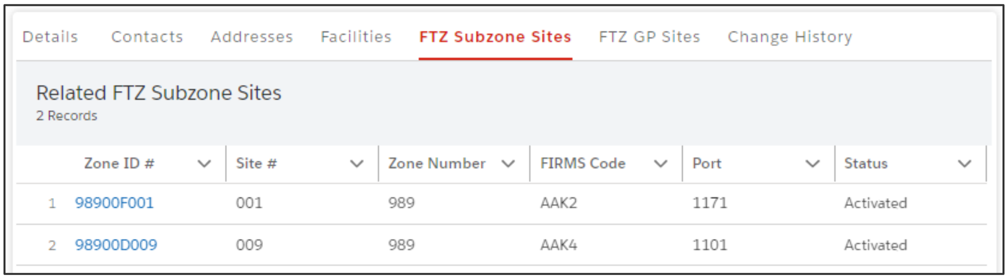
19. Select the **Facilities** tab to view the list of facilities.



a. Select the **Facility Name** hyperlink to view the facility account information.

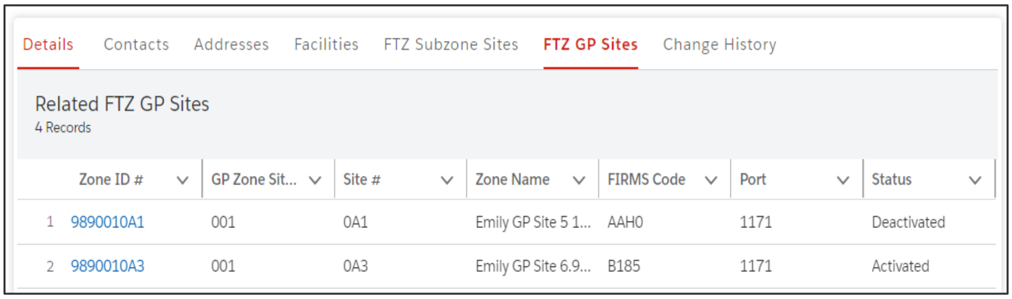
b. Select the **< Back** button to return to the facility operator account.

20. Select the **FTZ Subzone Sites** tab to view the list of FTZ subzone sites.



   a. Select the **Zone ID #** hyperlink to view the FTZ subzone site information.
   b. Select the **< Back** button to return to the facility operator account.

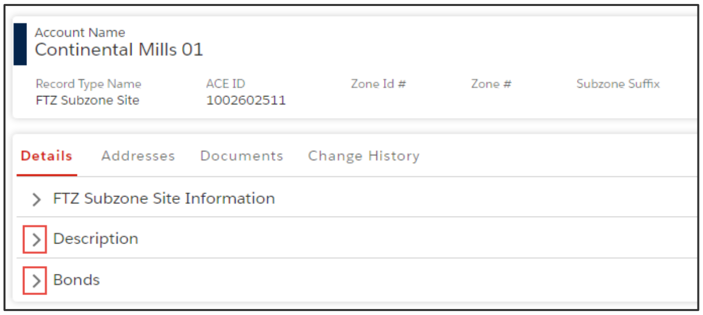
21. Select the **FTZ GP Sites** tab to view the list of FTZ GP sites.



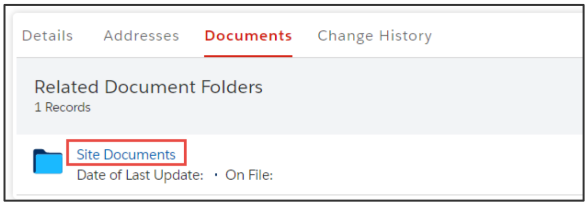
   a. Select the **Zone ID #** hyperlink to view the FTZ GP site information.
   b. Select the **< Back** button to return to the facility operator account.

<u>In an **FTZ Subzone Site** or **FTZ GP Site** account</u>, for users with permissions to view the description and bonds and to upload documents (steps 22-25):

22. In the **Details** tab, expand the **Description** section to view description information.



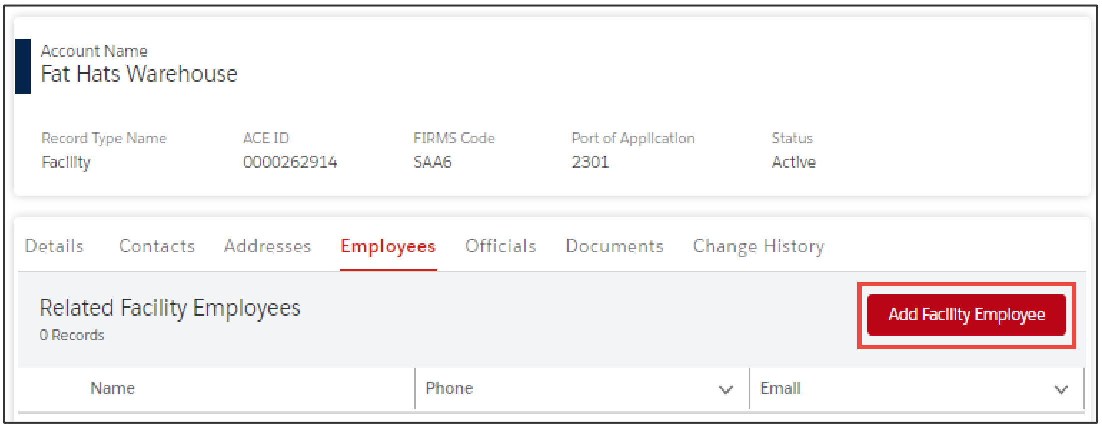
23. In the **Details** tab, expand the **Bonds** section to view bonds information.
24. Select the **Documents** tab to view the list of document folders.



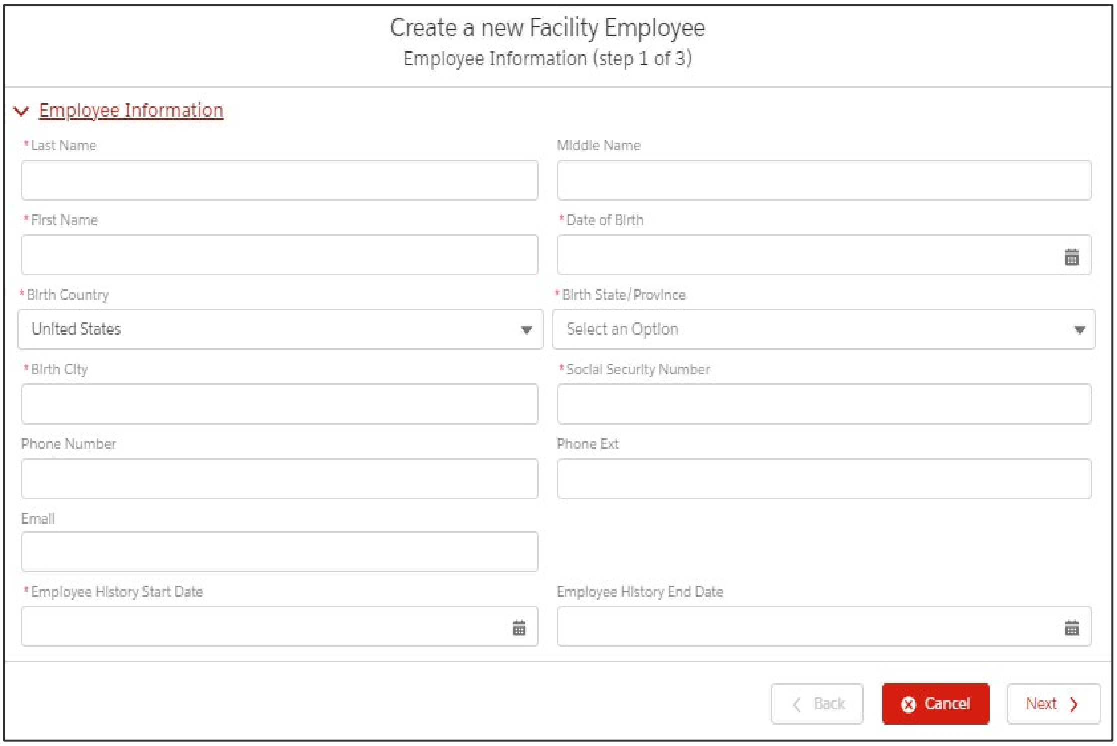
25. To upload a document to an existing document folder added by the FTZ board or a CBP officer, reference the Documents topic and the **Add a Document to a Document Folder** step table for details.

In a **Facility** account, for users with permissions to view, edit, and add employees, officials, and document folders and documents (steps 26-29):

26. Select the **Employees** tab and the **Add Facility Employee** button.

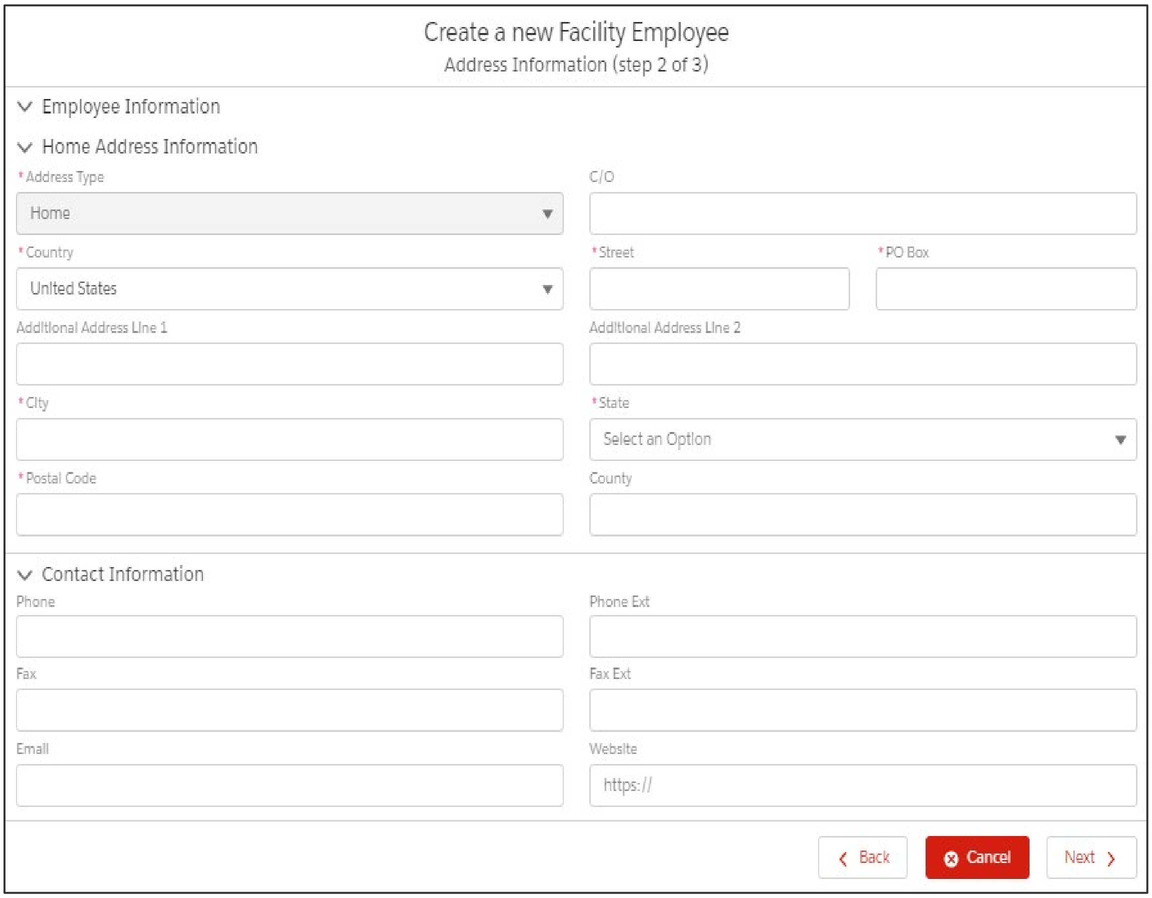


a. In the **Create a new Facility Employee** pane, in the **Employee Information** section, complete the appropriate employee fields.



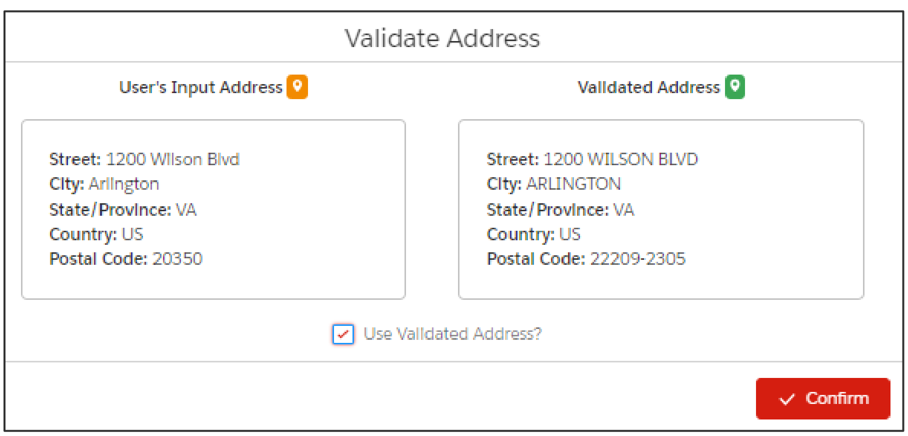
b. Select the **Next >** button.

c. In the **Home Address Information** and **Contact Information** sections, complete the appropriate address and contact fields.



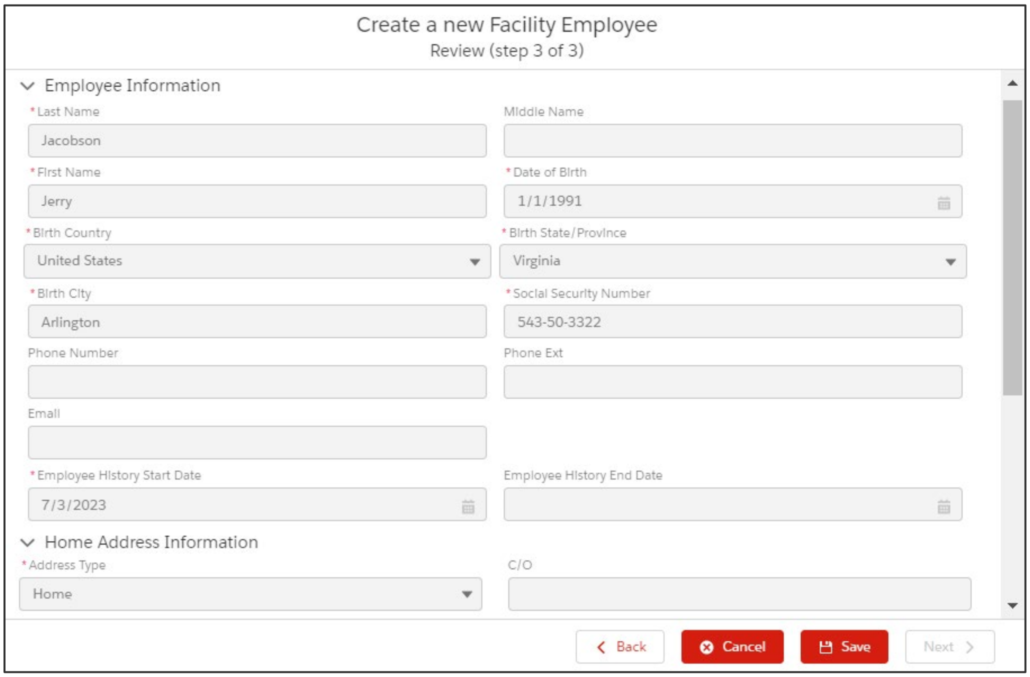
d. Select the **Next >** button.

The **Validate Address** dialog box displays.



e. Select the **Confirm** button to confirm the validated address.

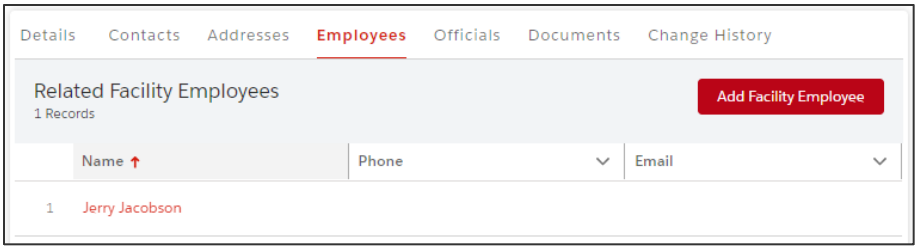
f. In the **Create a new Facility Employee Review** pane, review the added information, scrolling down to review all fields.



g. Select the **Save** button to save the facility employee.

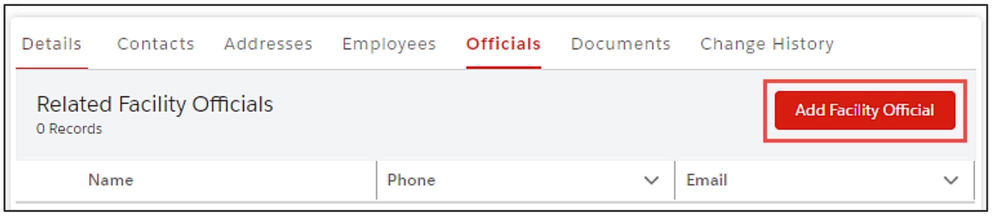
The **Success** message displays.

The new facility employee displays in the **Related Facility Employees** list.

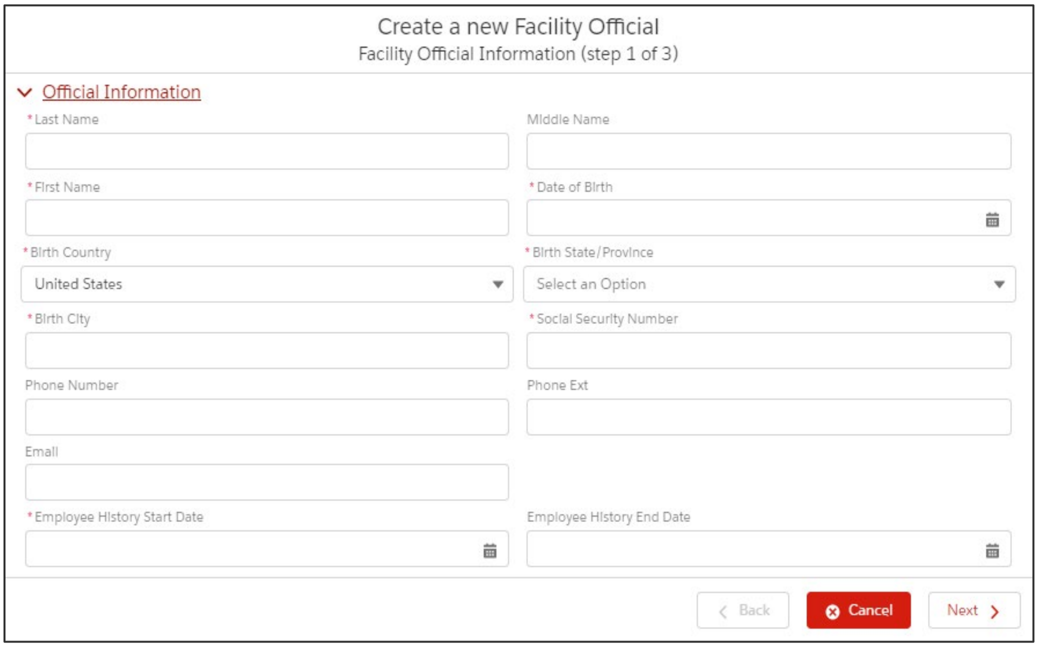


NOTE: Select the **Name** hyperlink to display the facility employee information and the **Edit** icon to update the facility employee information.

27. Select the **Officials** tab and the **Add Facility Official** button.

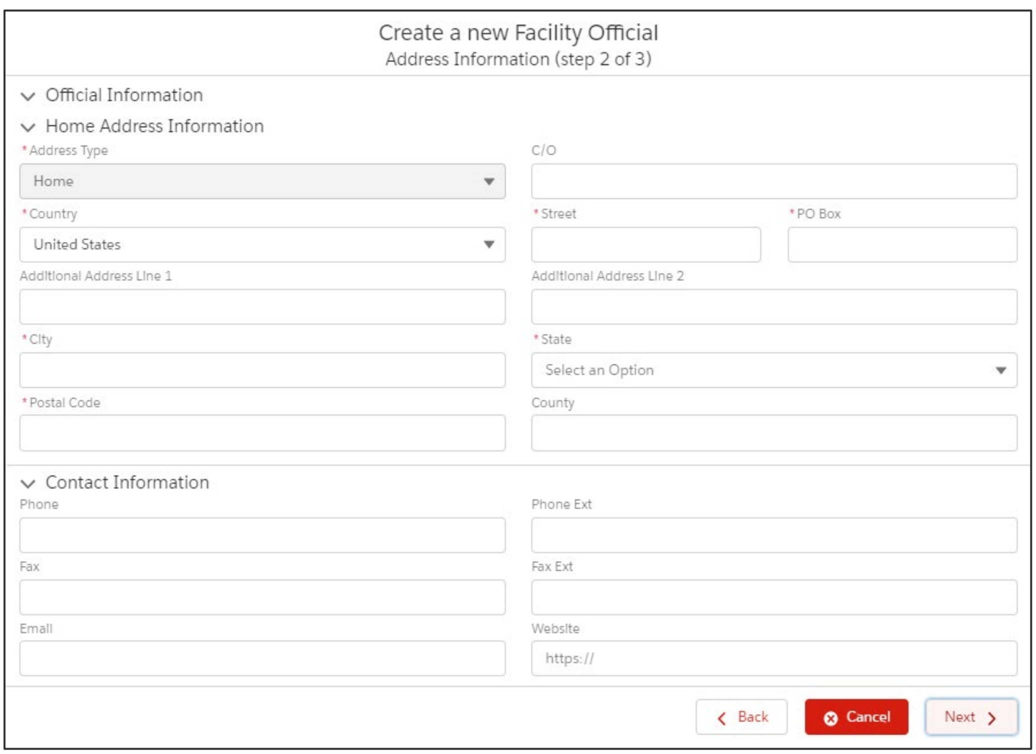


a. In the **Create a new Facility Official** pane, in the **Official Information** section, complete the appropriate official fields.



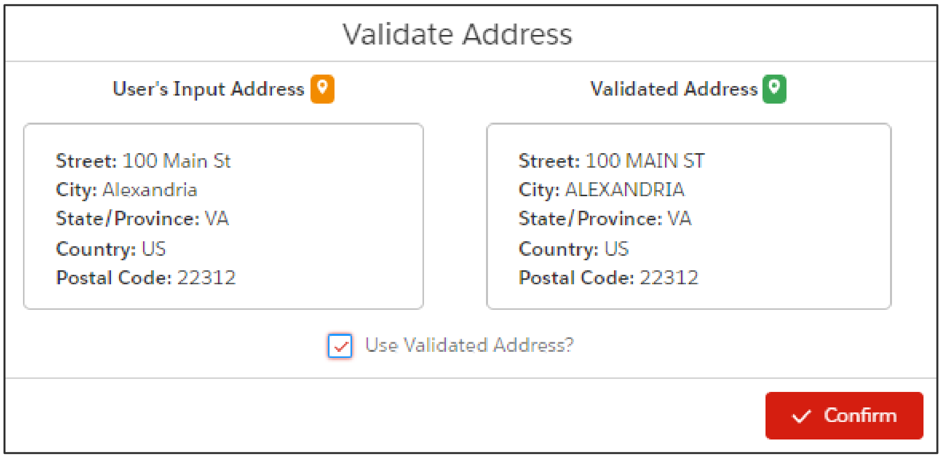
b. Select the **Next >** button.

c. In the **Home Address Information** and **Contact Information** sections, complete the appropriate address and contact fields.



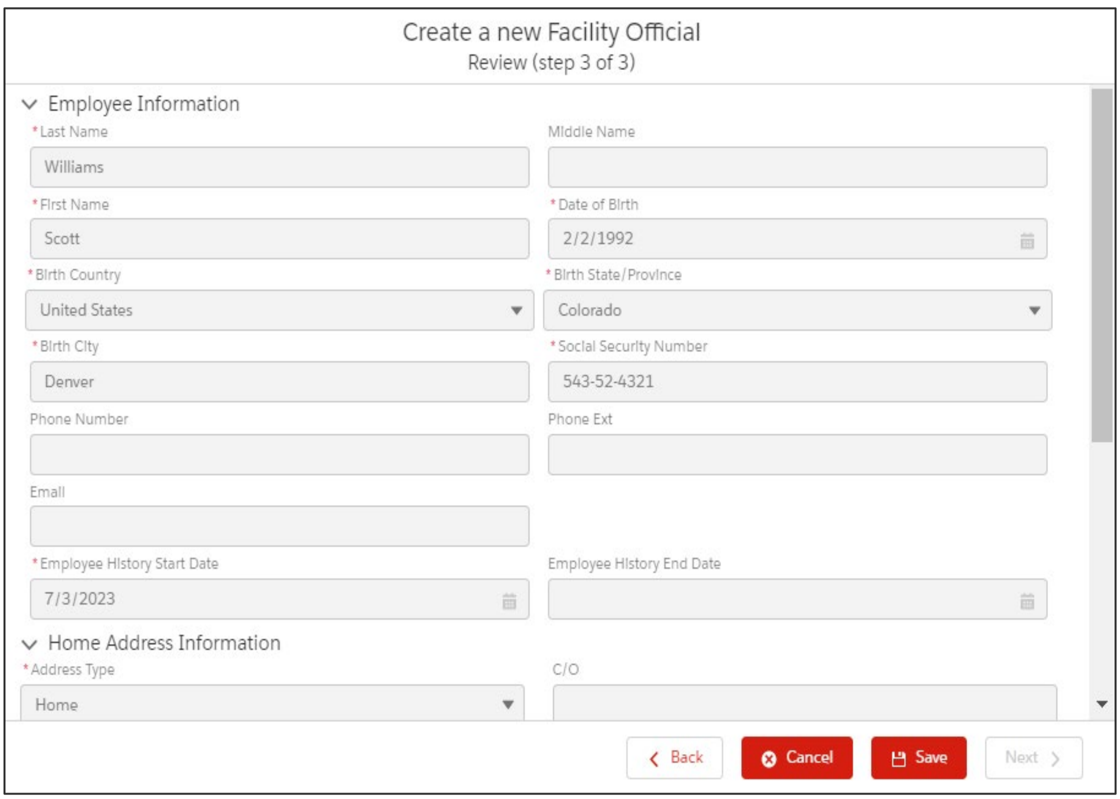
d. Select the **Next >** button.

The **Validate Address** dialog box displays.



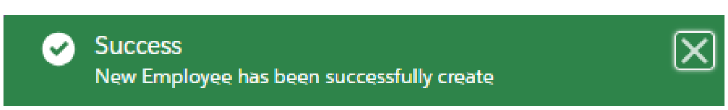
e. Select the **Confirm** button to confirm the validated address.

f. In the **Create a new Facility Official Review** pane, review the added information, scrolling down to review all fields.

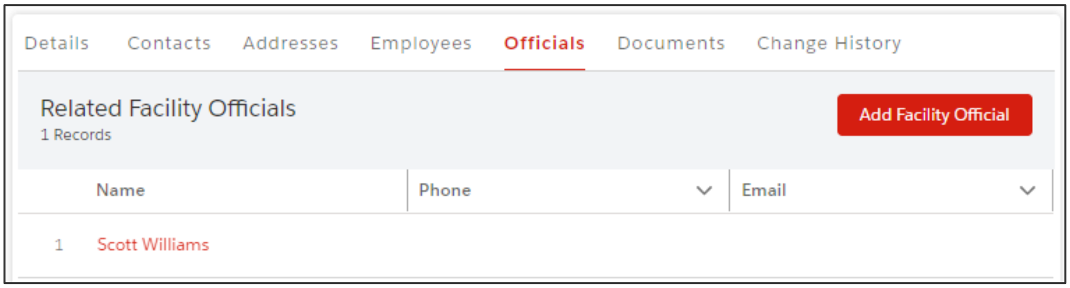


g. Select the **Save** button to save the facility official.

The **Success** message displays.

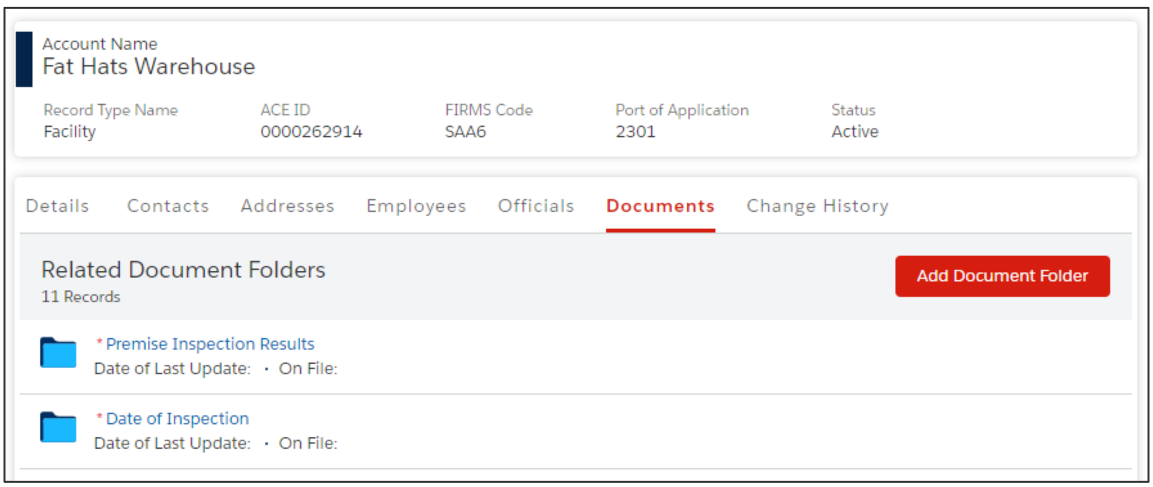


The new facility official displays in the **Related Facility Officials** list.



NOTE: Select the **Name** hyperlink to display the facility official information and the **Edit** icon to update the facility official information.

28. Select the **Documents** tab to view the list of existing document folders.



29. If applicable, reference the Documents topic for details to add, edit, and delete custom document folders and upload documents.

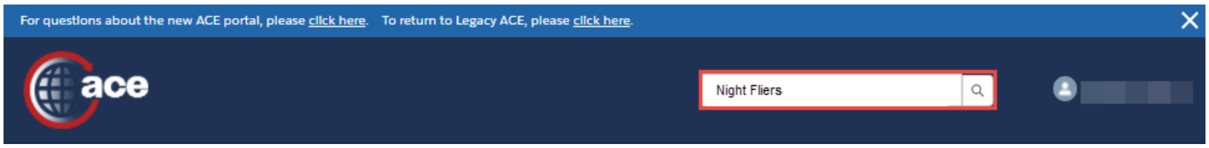
Topic 6: Add an Address to a Subaccount

Introduction

Modernized ACE Portal streamlines the add address functionality.

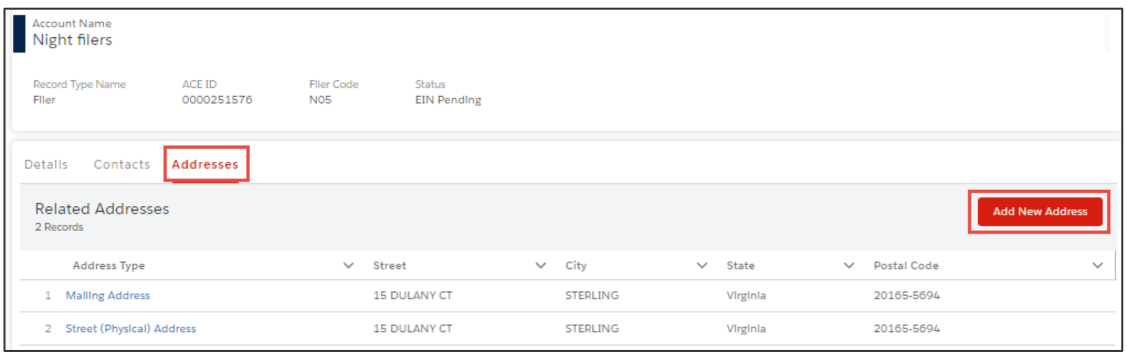
Add an Address to a Subaccount

1. Locate a subaccount.



TIP: You can select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If you recently viewed the account, select it in the **Recently Viewed Accounts** list.

2. In the pane that displays:
   a. Select the **Addresses** tab.
   b. Select the **Add New Address** button.

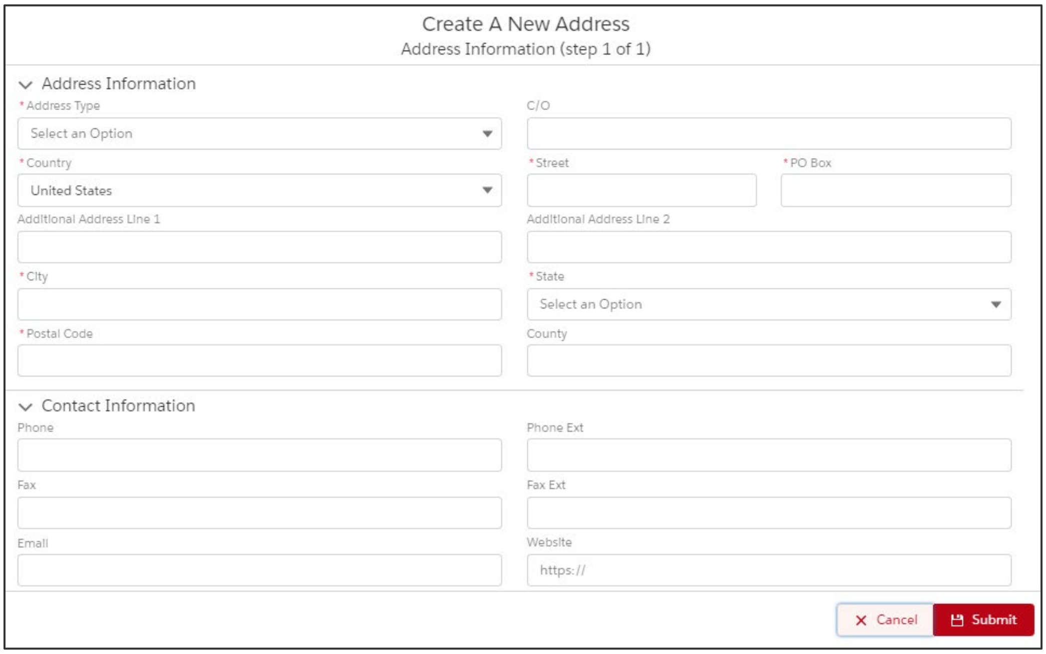


TIP: You can update an existing address by selecting the address type hyperlink in the **Address Type** column.

3. In the **Create A New Address** pane, in the **Address Information** section:
   a. In the ***Address Type** drop-down menu, select the type of address.
   b. In the ***Street** field, type the *street address*.
   c. In the ***City** field, type the *city where the address is located*.
   d. In the ***State** field, type the *state where the address is located*.
   e. In the ***Postal Code** field, type the *zip code for the address*.
4. In the **Contact Information** section:
   a. In the **Phone** field, type the *telephone number for the address*.
   b. In the **Email** field, type the *email address for the location.*

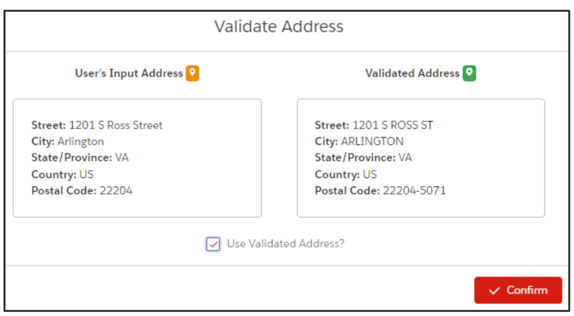
c. Complete other fields, as appropriate.

d. Select the **Save** button.

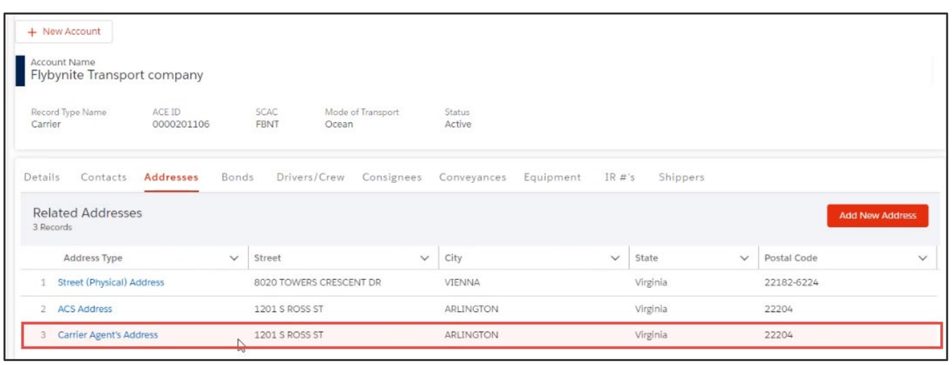


NOTE: <u>For an **Importer** account</u>, the information in the **Contact Information** section for the **Street (Physical) Address** displays in the **Additional Information** section of the **Details** tab.

5. In the **Validate Address** dialog box, select the Confirm button.



The new address displays in the **Related Addresses** list.



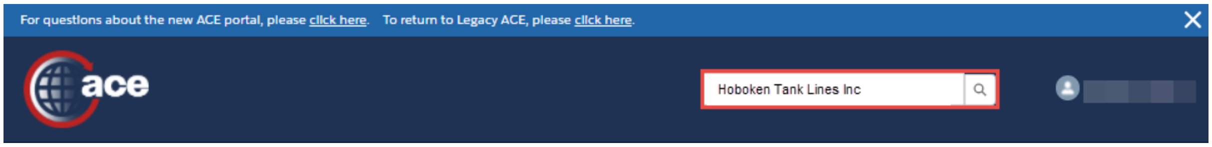
TOPIC 7: ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

INTRODUCTION

To add a contact to an account or subaccount, select the **Add Contact** button and complete the steps. Fields with an asterisk are required.

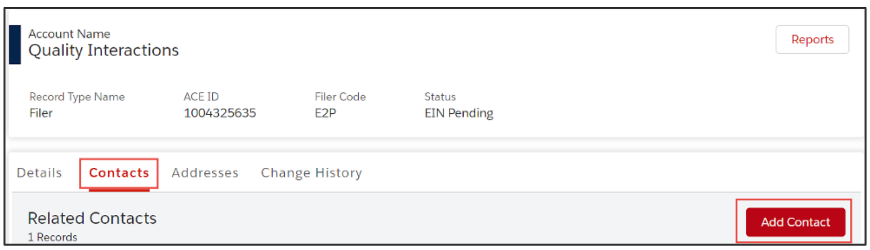
ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

1. Locate a subaccount.



TIP: You can select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If you recently viewed the account, select it in the **Recently Viewed Accounts** list.

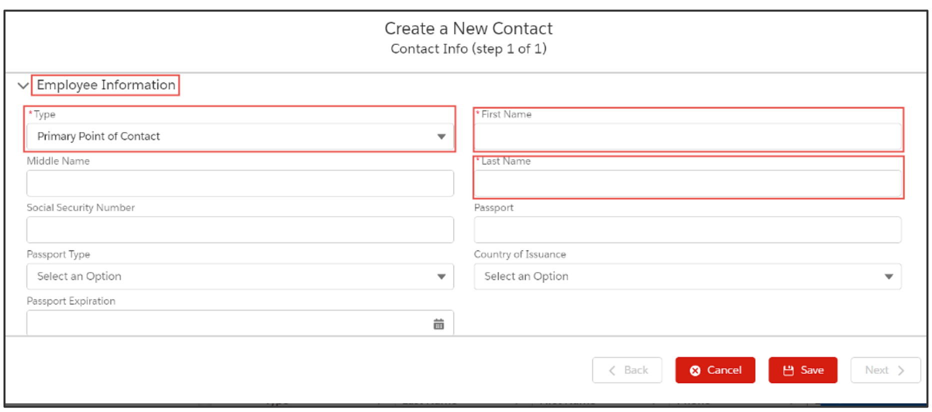
2. In the pane that displays:



   a. Select the **Contacts** tab.

   b. Select the **Add Contact** button.

3. In the **Create a New Contact** pane, in the **Employee Information** section:



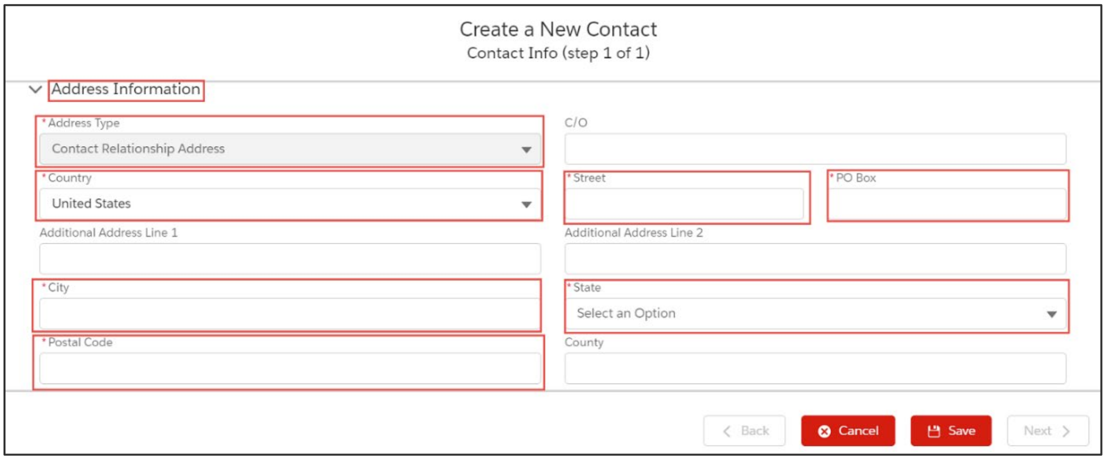
   a. In the ***Type** drop-down menu, select the type of contact.

   b. In the ***First Name** field, type the *contact's first name.*

   c. In the ***Last Name** field, type the *contact's last name.*

   d. Complete other fields, as appropriate.

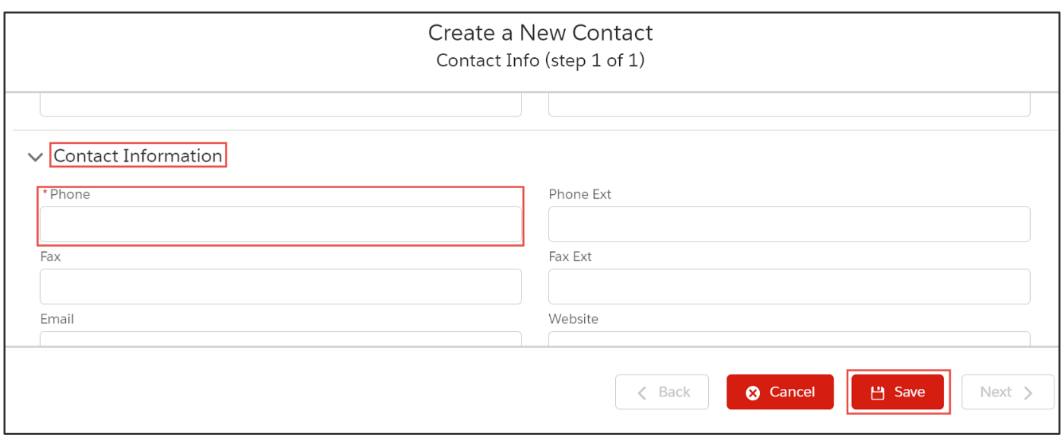
4. In the **Address Information** section:



NOTE: The ***Address Type** field and address section title may vary depending upon the account type. The ***Address Type** field is prefilled by default and not editable. The ***Country** field may also be prefilled by default and not editable, depending upon the account type.

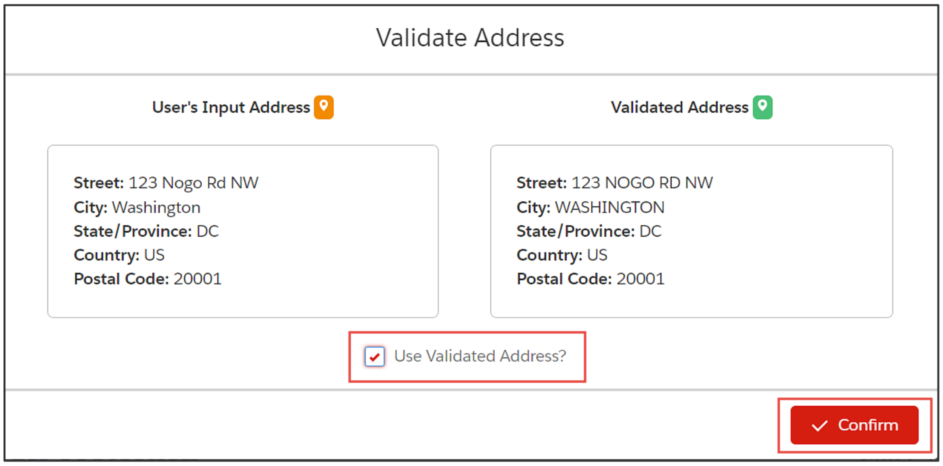
a. Enter either the ***Street** or ***PO Box**:
   i. In the ***Street** field, type the *street address*.
   OR
   ii. In the ***PO Box** field, type the *PO box number*.
b. In the ***City** field, type the *city*.
c. In the ***State** drop-down menu, select the state.
d. In the ***Postal Code** field, type the *postal code.*
e. Complete other fields, as appropriate.

5. In the **Contact Information** section:



a. In the ***Phone** field, type the *phone number*.
b. Complete other fields, as appropriate.
c. Select the **Save** button.

6. In the **Validate Address** dialog box:



a. If necessary, select the **Use Validated Address?** checkbox to use the validated address.

b. Select the **Confirm** button.

The **Record Saved** message displays.

Topic 8: Add and Edit Document Folders and Documents

Introduction

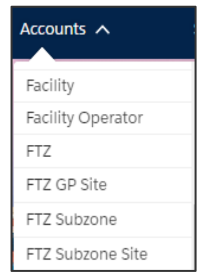
The Documents feature applies to Facility, FTZ Subzone Site, and FTZ GP Site account types.

For a **Facility** account, the **Documents** tab displays eleven predefined document folders that correspond to the Document Types in Legacy ACE. You can add custom document folders to organize documents and add documents to both predefined and custom document folders.

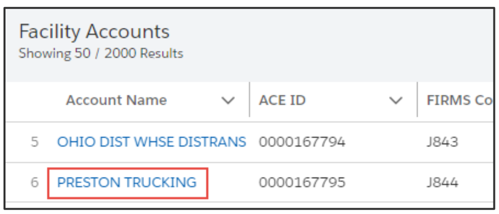
You can delete a custom document folder. Doing so also deletes all documents in the custom document folder.

View Document Folders

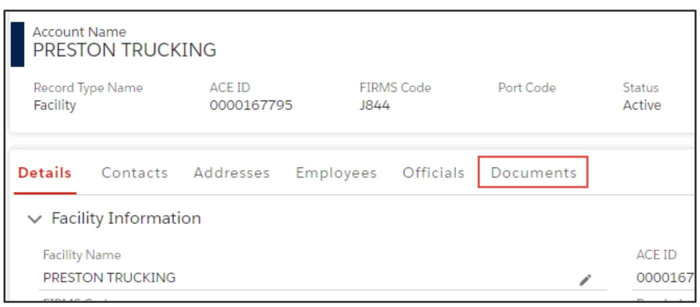
1. In the **Accounts** drop-down menu, select the **Facility**, **FTZ Subzone Site**, or **FTZ GP Site** account type.



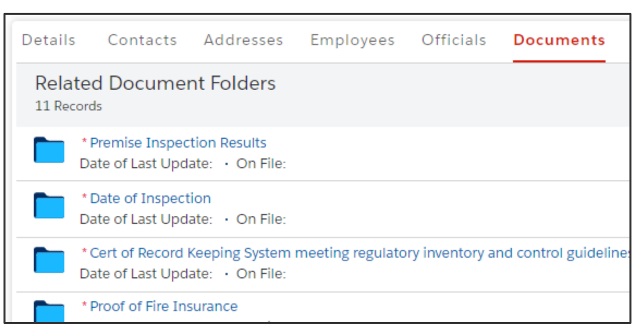
2. In the accounts page, in the **Account Name** column, select the account hyperlink.



3. In the **Account Name** pane, select the **Documents** tab.



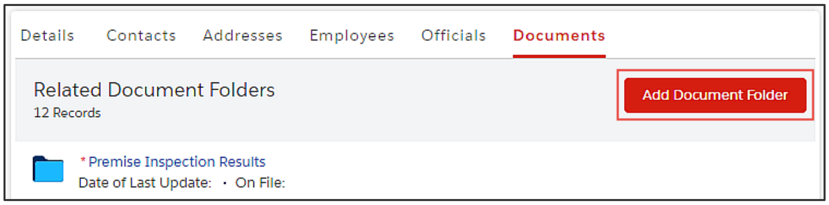
A list of document folders displays.



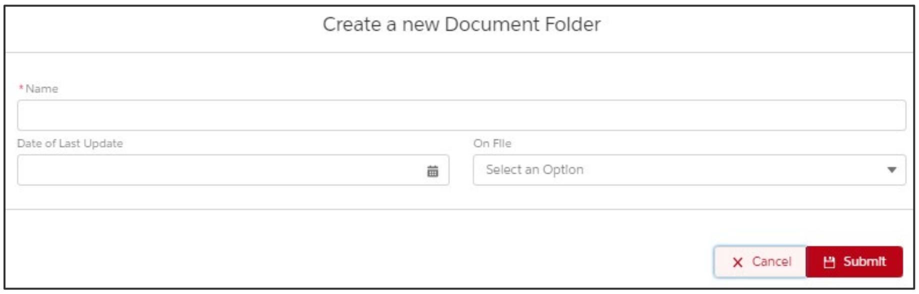
NOTE: The **Records** count at the top indicates the number of document folders.

Add a Custom Document Folder

1. In the **Documents** tab, select the **Add Document Folder** button.



2. In the **Create a new Document Folder** pane:



   a. In the ***Name** field, type the *folder name.*

   b. If applicable, in the **Date of Last Update** field, type a *date* or select the calendar icon and select a date.

   c. If applicable, in the **On File** drop-down menu, select an option.

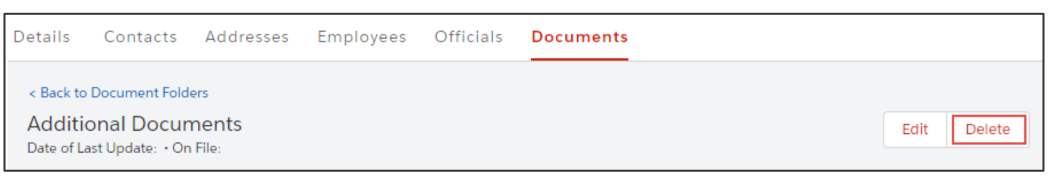
   d. Select the **Submit** button.

   The new custom document folder displays in the **Related Document Folders** list and the **Records** count increases by one.

Delete a Custom Document Folder

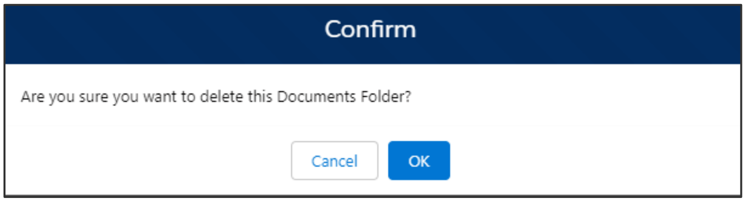
NOTE: Folders with an asterisk * are required and cannot be deleted. You can only delete custom document folders.

1. In the **Documents** tab, in the **Related Document Folders** list, select a custom document folder name hyperlink.
2. Select the **Delete** button.



IMPORTANT: All documents in the folder are also deleted.

The **Confirm** dialog box displays.

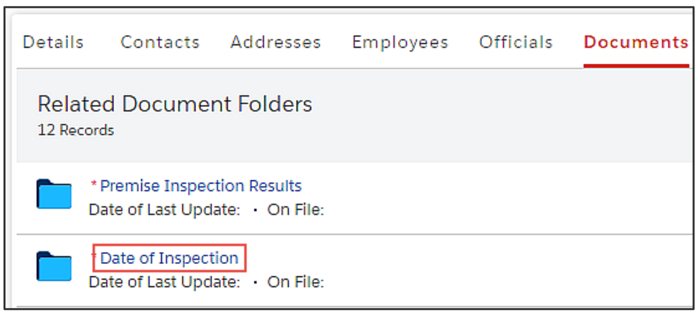


3. Select the **OK** button to delete the document folder.

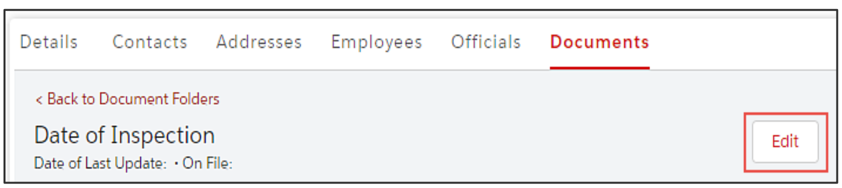
   The document folder is removed from the **Related Document Folders** list.

EDIT A DOCUMENT FOLDER

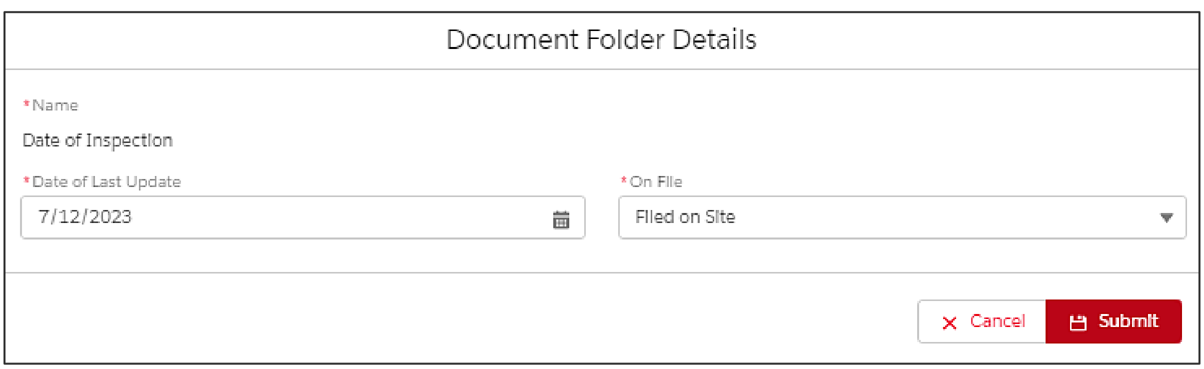
1. In the **Documents** tab, in the **Related Document Folders** list, select the document folder name hyperlink.



2. Select the **Edit** button.



3. In the **Document Folder Details** pane:



NOTE: The folder name is not editable.

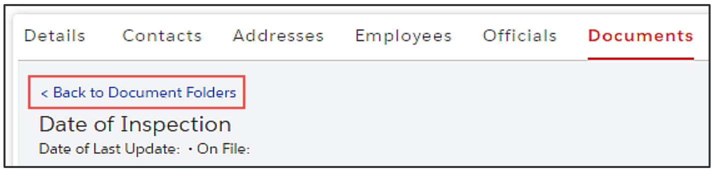
a. If applicable, in the ***Date of Last Update** field, type a *date* or select the calendar icon and select a date.

b. If applicable, in the ***On File** drop-down menu, select an option.

NOTE: The **N/A** and **Not on File** options do not require adding documents.

c. Select the **Submit** button.

4. Select the **Back to Document Folders** hyperlink to return to the **Related Document Folders** list.



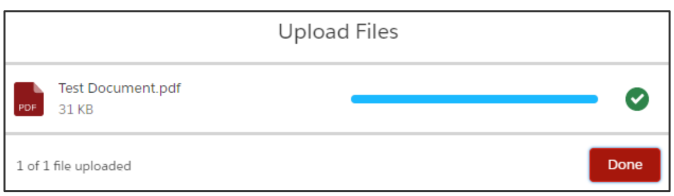
Add a Document to a Document Folder

1. In the **Documents** tab, in the **Related Document Folders** list, select the document folder name hyperlink.
2. In the **Related Documents** section, select the **Upload Files** button.

3. In the **Open** dialog box, locate and select the file to upload.
4. Select the **Open** button.

TIP: You can drag and drop the selected file to the **Or drop files** button.

The **Upload Files** dialog box displays the progress of the file upload.



5. Select the **Done** button when the upload is complete.

The uploaded document displays in the **Related Documents** list.

6. Select the **Back to Document Folders** hyperlink to return to the **Related Document Folders** list.

Topic 9: Share Feedback on the Modernized ACE Portal

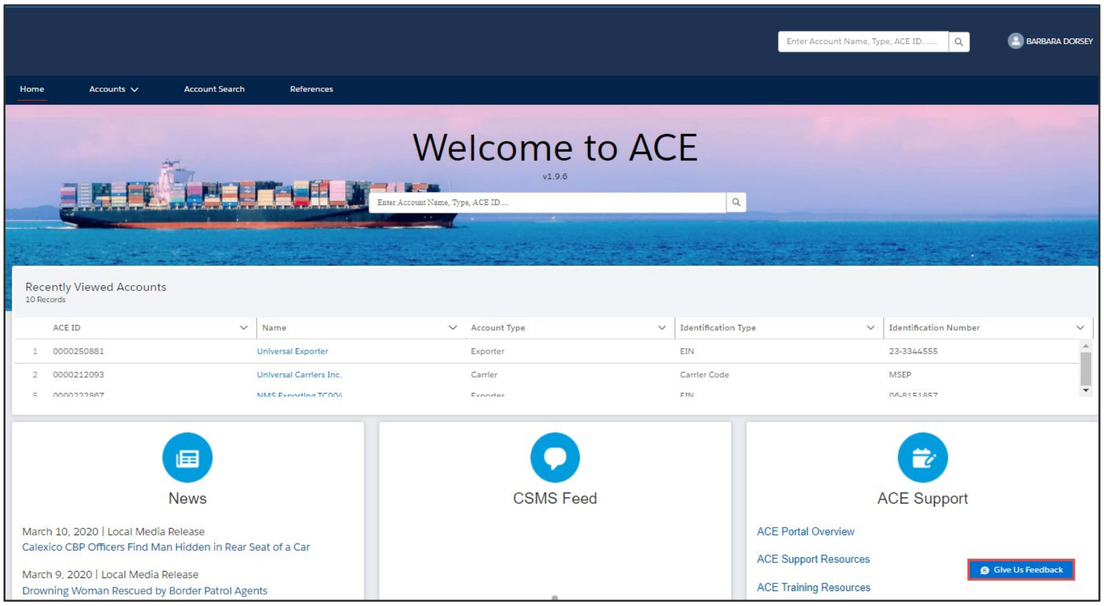
Introduction

Share feedback on what you like or what can be improved using the Give Us Feedback feature. The feedback is monitored and shared with the stakeholders to determine if the suggestion(s) should be implemented.

The **Give Us Feedback** button displays on each page of the Modernized ACE Portal.

Share Feedback on the Modernized ACE Portal

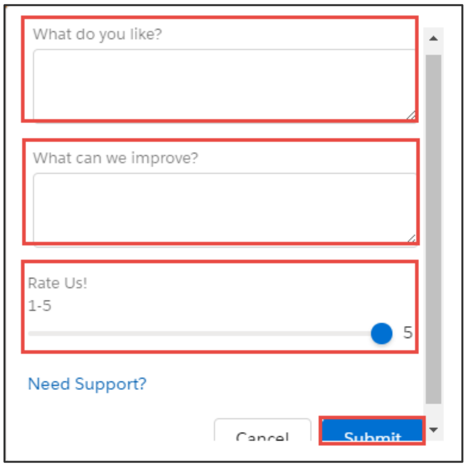
1. In the Modernized ACE Portal**,** select the **Give Us Feedback** button.



2. In the **Give Us Feedback** dialog box:
   a. In the **What do you like?** field, type a *comment*.
   b. In the **What we can improve?** field, type a *comment*.
   c. In the **Rate Us!** field, move the slider bar to rate the UI.
   d. Select the **Submit** button.

NOTE: Select the **Cancel** button to cancel the feedback and close the dialog box.

Select the **Need Support?** hyperlink for general information about CBP.



Topic 10: Access Support for Modernized ACE Portal Issues

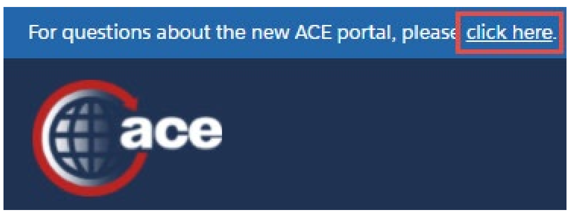
Introduction

Unlike Feedback, use the Support feature to get help with technical issues.

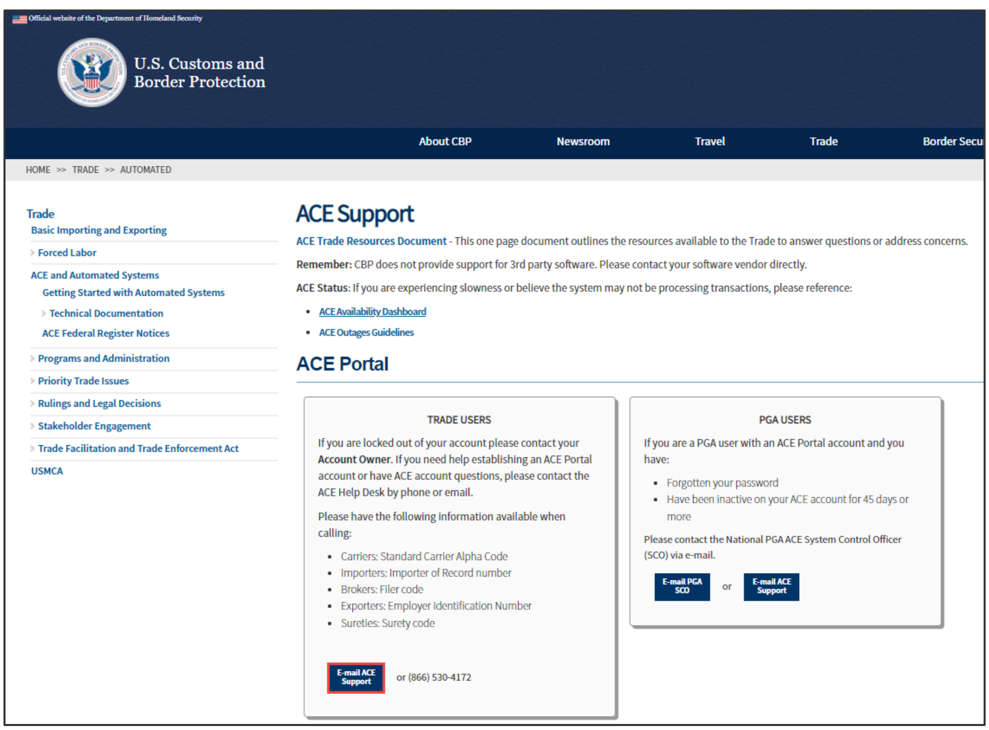
Access Support for Modernized ACE Portal Issues

1. In the Modernized ACE Portal home page, select **Support** from the drop-down menu next to your name.

NOTE: You can also access support through the **click here** hyperlink at the top of the home page.



2. In the **ACE Support** home page, in the ACE Portal section, select the **E-mail ACE Support** button.

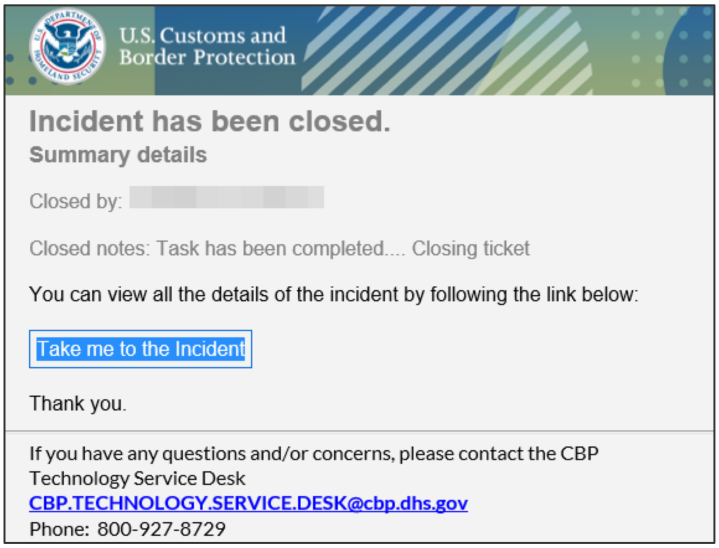


An email addressed to ACE.Support@cbp.dhs.gov will open in your default email application.

3. In the email body, type the issue you are having with the Modernized ACE Portal.

4. Select the send button.

   The email is sent to the CBP Technology Service Desk (TSD)/ACE Service Desk (ASD). An email will be sent back when the issue is resolved and/or seeking additional information acknowledging the receipt of the request.


U.S. Customs and Border Protection

Incident has been closed.

Summary details

Closed by:

Closed notes: Task has been completed.... Closing ticket

You can view all the details of the incident by following the link below:

Take me to the Incident

Thank you.

If you have any questions and/or concerns, please contact the CBP Technology Service Desk
CBP.TECHNOLOGY.SERVICE.DESK@cbp.dhs.gov
Phone: 800-927-8729